

CITY COUNCIL MEETING
September 10, 2024
6:00 P.M.



www.ci.bonney-lake.wa.us

AGENDA

Location: Bonney Lake Justice & Municipal Center, 9002 Main Street East, Bonney Lake, Washington.

The public is invited to attend Council Meetings and Workshops in person, via conference call or over the internet. The information for attending is provided below.

Council Meetings options:

In-Person: Bonney Lake Justice & Municipal Center at 9002 Main Street East in Bonney Lake

By phone: 323-792-6234 (Meeting ID: 25293748#)

By internet: Teams meeting link: [TEAMS](#) (Meeting ID: 287 370 705 513) **The City will be turning off all public cameras and microphones when attending online until the start of the citizen commenting section and will then turn them back off after the citizen commenting section is finished - Only staff and presenters will be visible and unmuted during the entire meeting.**

I. CALL TO ORDER – Mayor Terry Carter

- A. Pledge of Allegiance
- B. Roll Call: Mayor Terry Carter, Deputy Mayor Swatman, Councilmember Angela Baldwin, Councilmember Aaron Davis, Councilmember Gwendolyn Fullerton, Councilmember Kerri Hubler, Councilmember J. Kelly McClimans, And Councilmember Brittany Rock.
- C. Agenda Modifications: None.
- D. Announcements, Appointments and Presentations: None.

II. PUBLIC HEARINGS, CITIZEN COMMENTS & CORRESPONDENCE:

- A. Public Hearing: None.
- B. Citizen Comments:
Citizen comments can be made in-person, by phone or virtually during this portion of the meeting. Comments are limited to 5 minutes. During the meeting, mics and video will be enabled for those that use the "raised hand" icon virtually-you will need to personally turn them on-during this section only. All who comment will be asked to state their name and address for the meeting record.
- C. Correspondence: None.

III. COUNCIL COMMITTEE REPORTS:

- A. Finance Committee
- B. Community Development Committee
- C. Public Safety Committee
- D. Other Reports

IV. CONSENT AGENDA:

The items listed below may be acted upon by a single motion and second of the City Council. By simple request to the Chair, any Councilmember may remove items from the Consent Agenda for separate consideration after the adoption of the remainder of the Consent Agenda items.

- A. **Approval of Corrected Minutes:** None.
- B. **Approval of Accounts Payable and Utility Refund Checks/Vouchers:** Accounts Payable Check/Vouchers #97538 To #97656, And Wire Transfers #20240801, #2024071501, #2024081501, #2024082201, #2024082202, And #2024082101 In The Amount Of \$1,206,568.28 **Voids:** None.
- C. **Approval of Payroll:** August 16 – 31, 2024 For Checks #35039 - 35045 Including Direct Deposits And Electronic Transfers Totaling \$890,484.28. **Voids:** None.

V. FULL COUNCIL ISSUES:

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- A. **AB24-87 – Resolution R24-87** - A Resolution Of The City Council Of The City Of Bonney Lake, Pierce County, Washington, Authorizing The Mayor To Sign An Agreement With Tyler Technologies To Migrate The City's Enterprise Resource Planning Systems And Authorize Out Of State Travel For 2025-2027 To The Tyler Connect Conferences And Authorize Extra Hire And/Or Overtime To Support This Migration Project. (15 mins)

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- B. **AB24-60 – Motion M24-60** - A Motion Of The City Council Of The City Of Bonney Lake, Pierce County, Washington, Directing Staff To Submit The August 2024 Version Of The Community Development Element To The Department Of Commerce And To Include It In The Final Version Of The Comprehensive Plan. (35 mins)

VI. EXECUTIVE/CLOSED SESSION: None.**VII. ADJOURNMENT**

For citizens with disabilities requesting translators or adaptive equipment for communication purposes, the City requests notification as early as possible prior to the meeting regarding the type of service or equipment needed.

THE COUNCIL MAY ADD AND TAKE ACTION ON OTHER ITEMS NOT LISTED ON THIS AGENDA

City of Bonney Lake, Washington
City Council Agenda Bill (AB)

Agenda Item Type: Resolution	Agenda Bill Number & Ordinance/Resolution/Motion Number: AB24-87 RES R24-87	
Department/Division Submitting: Information Services	Presenter: Chuck McEwen	City Strategic Goal Category: DON'T FILL OUT YET

Agenda Subject: Migration Project From Eden To Tyler EERP & EPNL

Full Title/Motion: A Resolution Of The City Council Of The City Of Bonney Lake, Pierce County, Washington, Authorizing The Mayor To Sign An Agreement With Tyler Technologies To Migrate The City's Enterprise Resource Planning Systems And Authorize Out Of State Travel For 2025-2027 To The Tyler Connect Conferences And Authorize Extra Hire And/Or Overtime To Support This Migration Project.

Administrative Recommendation: Approval.

Short Background Summary: Eden Replacement Project, Migrate And Convert Data From Eden To E-ERP And EPNL, Authorize Staff To Attend Tyler Connect For The Next 3 Years, And Authorize Overtime And/Or Extra Hire Help To Support Implementation Of The New Tyler ERP Systems. (See Attached Memo).

Attachments:

BUDGET INFORMATION

Budgeted Amount	Current Balance	Expenditure Amount Needed	Budgeted Balance Difference
Not Budgeted	\$300,000	\$970,000	\$-670,000

Budget Explanation: In 2021 An Eden Replacement Fund Was Created, And \$50,000/ Year Was Approved. The Remaining Amount Would Be Funded From Ending Fund Balance If Approved.

COMMITTEE, BOARD & COMMISSION REVIEW

Public Hearing Date: **Name Of Committee/Commission Public Hearing Was Done At:**

Date & Name Of Committee/ Commission Meeting	Return To Committee/ Commission/Board	Council Workshop Discussion	Consent Agenda	Council Full Issues	Chair's Signature For Approval Of Next Steps
Date: 8/13/2024 Name: Finance Committee	☒ Yes	☐ Yes	☐ Yes	☐ Yes	Return to Finance Committee
Date: 8/27/2024 Name: Finance Committee	☐ Yes	☐ Yes	☐ Yes	☒ Yes	
Date: Name:	☐ Yes	☐ Yes	☐ Yes	☐ Yes	
Date: Name:	☐ Yes	☐ Yes	☐ Yes	☐ Yes	

Hearing Examiner Review:

COUNCIL ACTION

Workshop Date(s):	Public Hearing Date(s):
Meeting Date(s): 9/10/24	Tabled To:

APPROVALS

Department Director: <i>Chuck McEwen</i>	Mayor: <i>Terry Carter</i>	Date Reviewed By City Attorney (if applicable): 6/17/2024
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RESOLUTION NO. R24-87

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF BONNEY LAKE, PIERCE COUNTY, WASHINGTON, AUTHORIZING THE MAYOR TO SIGN AN AGREEMENT WITH TYLER TECHNOLOGIES TO MIGRATE THE CITY'S ENTERPRISE RESOURCE PLANNING SYSTEMS AND AUTHORIZE OUT OF STATE TRAVEL FOR 2025-2027 TO THE TYLER CONNECT CONFERENCES AND AUTHORIZE EXTRA HIRE AND/OR OVERTIME TO SUPPORT THIS MIGRATION PROJECT.

NOW THEREFORE, THE CITY COUNCIL OF THE CITY OF BONNEY LAKE, WASHINGTON DOES HEREBY RESOLVE AS FOLLOWS:

The Mayor is authorized to sign the agreements between the City of Bonney Lake and Tyler Technologies to migrate from Eden to Tyler E-ERP & EPNL, authorize additional overtime and/or extra hire to support this migration and authorize out of state travel for staff to attend the Tyler Technologies Connect Conferences in 2025-2027.

PASSED by the City Council this 10th day of August, 2024.

Terry Carter, Mayor

AUTHENTICATED:

Sadie A. Schaneman, CMC, City Clerk



Memo

Date : August 27th, 2024
To : Mayor and Councilmembers
From : Chuck McEwen
CC: : **John Vodopich, Cherie Reiersen**
Re : Tyler Eden migration project

The City currently contracts with Tyler Technologies for Enterprise Resource Planning (ERP) software. The city has been using an ERP solution for over the past two decades called Eden (Inforum Gold). Eden is nearing end of life / end of support (2027) and subsequently has not been developed to meet current and future demands. ERP software supports the financial, utility billing, permitting and human resources functions of the City. A fully functional modern ERP software solution will provide efficiencies in reducing manual processes, more intuitive functionality and greater transparency for our citizens. Staff evaluated other ERP solutions offered by Tyler and is recommending converting to Tyler E-ERP (formerly Munis) for Financials, Human Resources, Utilities and Payroll and EPNL (formerly Energov) for Parcels, Permits and Inspections. This evaluation included meeting with other cities who have migrated to Munis, multiple on-site and web-based demonstrations for staff and conference presentations. Staff is confident that staying in the Tyler portfolio provides the most benefit; including evergreen licensing credit (not having to buy modules again) and data conversion experience (Tyler has converted over 50 Eden clients to Munis). Other ERP solutions were researched, however were not cost effective based on licensing and data conversion costs. Tyler Technologies is also available through the National Joint Powers Alliance (NJPA) as well as NASPO ValuePoint. NJPA & NASPO provides competitive contract opportunities for municipal purchases and meets the competitive contracting requirements. The total estimated cost to implement Tyler E-ERP & EPNL is \$970,000 including cloud hosting & storage, data migration, implementation, additional staff budget for a combination of overtime &/or extra hire support, conference registrations and travel for staff in 2025-2027 and additional hardware costs. Projected annual maintenance costs is \$220,000. The Tyler/Eden migration project will be funded by cumulative reserve saving (began in 2021 \$50,000/year (\$200,000)) and ending fund balance if approved. Ongoing annual maintenance has been added to the 2026 proposed budget. The city attorney has reviewed the agreements and has approved to form. A question was asked about what other local municipalities are using. There are 30 entities in Washington/Oregon that have converted Eden to Tyler (Munis/E-ERP). There are an additional 47 entities that are Munis/E-ERP clients for a total of 77 current Tyler customers using

Munis/E-ERP. There are currently 5 other agencies that are working on agreements to move from Eden to Tyler Munis/E-ERP. See below tables:

Current Tyler Munis E-ERP Client

Customer	City	State
Benton County	Corvallis	OR
City of Ashland	Ashland	OR
City of Bend	Bend	OR
City of Corvallis	Corvallis	OR
City of Grants Pass	Grants Pass	OR
City of Gresham	Gresham	OR
City of Hillsboro	Hillsboro	OR
City of Klamath Falls	Klamath Falls	OR
City of Tigard	Tigard	OR
Clackamas Fire District	Milwaukie	OR
Deschutes County	Bend	OR
Douglas County	Roseburg	OR
Salem Area Mass Transit District	Salem	OR
Salem-Keizer Public Schools	Salem	OR
Tualatin Hills Park and Recreation District	Beaverton	OR
Tualatin Valley Fire & Rescue	Tigard	OR
Asotin County Public Utility District	Clarkston	WA
Bellevue School District 405	Bellevue	WA
City of Bainbridge Island	Bainbridge Island	WA
City of Bothell	Bothell	WA
City of Burien	Burien	WA
City of Camas	Camas	WA
City of Kirkland	Kirkland	WA
City of Lynnwood	Lynnwood	WA
City of Marysville	Marysville	WA
City of Mercer Island	Mercer Island	WA
City of Moses Lake	Moses Lake	WA
	Mountlake	
City of Mountlake Terrace	Terrace	WA
City of Port Angeles	Port Angeles	WA
City of Richland	Richland	WA
City of Snoqualmie	Snoqualmie	WA
City of Tumwater	Tumwater	WA
City of Woodinville	Woodinville	WA
City of Yakima	Yakima	WA
Clover Park School District	Lakewood	WA
Grant County	Ephrata	WA

Grays Harbor County	Montesano	WA
Jefferson County	Port Townsend	WA
Lewis County	Chehalis	WA
Mason County	Shelton	WA
Metro Parks Tacoma	Tacoma	WA
Puget Sound Regional Fire Authority	Kent	WA
Quil Ceda Village	Tulalip	WA
SCORE - South Correctional Entity	Des Moines	WA
Spokane International Airport	Spokane	WA
Thurston County	Olympia	WA
Tulalip Tribes	Tulalip	WA

Previous Eden clients that have or are moving to Munis/E-ERP

Customer	City	State
City of Albany	Albany	OR
City of Forest Grove	Forest Grove	OR
City of Wilsonville	Wilsonville	OR
Lane Transit District	Eugene	OR
Wasco County	The Dalles	OR
Benton County	Prosser	WA
City of Centralia	Centralia	WA
City of Chehalis	Chehalis	WA
City of Des Moines	Des Moines	WA
City of Edmonds	Edmonds	WA
City of Enumclaw	Enumclaw	WA
City of Issaquah	Issaquah	WA
City of Kennewick	Kennewick	WA
City of Lakewood	Lakewood	WA
City of Longview	Longview	WA
City of Oak Harbor	Oak Harbor	WA
City of Pullman	Pullman	WA
City of Puyallup	Puyallup	WA
City of Spokane Valley	Spokane Valley	WA
City of Sumner	Sumner	WA
City of University Place	University Place	WA
City of Walla Walla	Walla Walla	WA
City of Wenatchee	Wenatchee	WA
Okanogan County	Okanogan	WA
Pacific County	South Bend	WA
Pierce County Library	Tacoma	WA
San Juan County	Friday Harbor	WA

Soos Creek Water and Sewer District	Renton	WA	
South Sound 911	Tacoma	WA	
Spokane Transit Authority	Spokane	WA	
City Of Renton	Renton	WA	Contract
			Negotiations
			Contract
City of Auburn	Auburn	WA	Negotiations
			Contract
City of Bonney Lake	Bonney Lake	WA	Negotiations
City of Anacortes	Anacortes	WA	RFP Process
Walla Walla County	Walla Walla	WA	RFP Process



SOFTWARE AS A SERVICE AGREEMENT

This Software as a Service Agreement is made between Tyler Technologies, Inc. and Client.

WHEREAS, Client selected Tyler to provide certain products and services set forth in the Investment Summary, including providing Client with access to Tyler's proprietary software products, and Tyler desires to provide such products and services under the terms of this Agreement;

NOW THEREFORE, in consideration of the foregoing and of the mutual covenants and promises set forth in this Agreement, Tyler and Client agree as follows:

SECTION A – DEFINITIONS

- **"Agreement"** means this Software as a Service Agreement.
- **"Business Travel Policy"** means our business travel policy. A copy of our current Business Travel Policy is attached as Schedule 1 to Exhibit B.
- **"Client"** means City of Bonney Lake, Washington.
- **"Data"** means your data necessary to utilize the Tyler Software.
- **"Data Storage Capacity"** means the contracted amount of storage capacity for your Data identified in the Investment Summary.
- **"Defect"** means a failure of the Tyler Software to substantially conform to the functional descriptions set forth in our written proposal to you, or their functional equivalent. Future functionality may be updated, modified, or otherwise enhanced through our maintenance and support services, and the governing functional descriptions for such future functionality will be set forth in our then-current Documentation.
- **"Defined Users"** means the number of users that are authorized to use the SaaS Services. The Defined Users for the Agreement are as identified in the Investment Summary. If Exhibit A contains Enterprise Permitting & Licensing labeled software, defined users mean the maximum number of named users that are authorized to use the Enterprise Permitting & Licensing labeled modules as indicated in the Investment Summary.
- **"Developer"** means a third party who owns the intellectual property rights to Third Party Software.
- **"Documentation"** means any online or written documentation related to the use or functionality of the Tyler Software that we provide or otherwise make available to you, including instructions, user guides, manuals and other training or self-help documentation.
- **"Effective Date"** means the date by which both your and our authorized representatives have signed the Agreement.
- **"Force Majeure"** means an event beyond the reasonable control of you or us, including, without limitation, governmental action, war, riot or civil commotion, fire, natural disaster, or any other cause that could not with reasonable diligence be foreseen or prevented by you or us.
- **"Investment Summary"** means the agreed upon cost proposal for the products and services attached as Exhibit A.



- **“Invoicing and Payment Policy”** means the invoicing and payment policy. A copy of our current Invoicing and Payment Policy is attached as Exhibit B.
- **“Order Form”** means an ordering document that includes a quote or investment summary and specifying the items to be provided by Tyler to Client, including any addenda and supplements thereto.
- **“SaaS Fees”** means the fees for the SaaS Services identified in the Investment Summary.
- **“SaaS Services”** means software as a service consisting of system administration, system management, and system monitoring activities that Tyler performs for the Tyler Software, and includes the right to access and use the Tyler Software, receive maintenance and support on the Tyler Software, including Downtime resolution under the terms of the SLA, and Data storage and archiving. SaaS Services do not include support of an operating system or hardware, support outside of our normal business hours, or training, consulting or other professional services.
- **“SLA”** means the service level agreement. A copy of our current SLA is attached hereto as Exhibit C.
- **“Statement of Work”** means the industry standard implementation plan describing how our professional services will be provided to implement the Tyler Software, and outlining your and our roles and responsibilities in connection with that implementation. The Statement of Work is attached as Exhibit E.
- **“Support Call Process”** means the support call process applicable to all of our customers who have licensed the Tyler Software. A copy of our current Support Call Process is attached as Schedule 1 to Exhibit C.
- **“Third Party Hardware”** means the third party hardware, if any, identified in the Investment Summary.
- **“Third Party Products”** means the Third Party Software and Third Party Hardware.
- **“Third Party SaaS Services”** means software as a service provided by a third party, if any, identified in the Investment Summary.
- **“Third Party Services”** means the third party services, if any, identified in the Investment Summary.
- **“Third Party Software”** means the third party software, if any, identified in the Investment Summary.
- **“Third Party Terms”** means, if any, the end user license agreement(s) or similar terms for the Third Party Products or other parties’ products or services, as applicable, and attached or indicated at Exhibit D.
- **“Tyler”** means Tyler Technologies, Inc., a Delaware corporation.
- **“Tyler Software”** means our proprietary software, including any integrations, custom modifications, and/or other related interfaces identified in the Investment Summary and licensed by us to you through this Agreement.
- **“we”, “us”, “our”** and similar terms mean Tyler.
- **“you”** and similar terms mean Client.

SECTION B – SAAS SERVICES

1. Rights Granted.

- 1.1 We grant to you the non-exclusive, non-assignable limited right to use the SaaS Services solely for your internal business purposes for the number of Defined Users only. The Tyler Software will be made available to you according to the terms of the SLA. You acknowledge that we have



no delivery obligations and we will not ship copies of the Tyler Software as part of the SaaS Services. You may use the SaaS Services to access updates and enhancements to the Tyler Software, as further described in Section C(9).

2. SaaS Fees. You agree to pay us the SaaS Fees. Those amounts are payable in accordance with our Invoicing and Payment Policy. The SaaS Fees are based on the number of Defined Users and amount of Data Storage Capacity. You may add additional users or additional data storage capacity on the terms set forth in Section H(1). In the event you regularly and/or meaningfully exceed the Defined Users or Data Storage Capacity, we reserve the right to charge you additional fees commensurate with the overage(s).
3. Ownership.
 - 3.1 We retain all ownership and intellectual property rights to the SaaS Services, the Tyler Software, and anything developed by us under this Agreement. You do not acquire under this Agreement any license to use the Tyler Software in excess of the scope and/or duration of the SaaS Services.
 - 3.2 The Documentation is licensed to you and may be used and copied by your employees for internal, non-commercial reference purposes only.
 - 3.3 You retain all ownership and intellectual property rights to the Data. You expressly recognize that except to the extent necessary to carry out our obligations contained in this Agreement, we do not create or endorse any Data used in connection with the SaaS Services.
4. Restrictions. You may not: (a) make the Tyler Software or Documentation resulting from the SaaS Services available in any manner to any third party for use in the third party's business operations; (b) modify, make derivative works of, disassemble, reverse compile, or reverse engineer any part of the SaaS Services; (c) access or use the SaaS Services in order to build or support, and/or assist a third party in building or supporting, products or services competitive to us; or (d) license, sell, rent, lease, transfer, assign, distribute, display, host, outsource, disclose, permit timesharing or service bureau use, or otherwise commercially exploit or make the SaaS Services, Tyler Software, or Documentation available to any third party other than as expressly permitted by this Agreement.
5. Software Warranty. We warrant that the Tyler Software will perform without Defects during the term of this Agreement. If the Tyler Software does not perform as warranted, we will use all reasonable efforts, consistent with industry standards, to cure the Defect in accordance with the maintenance and support process set forth in Section C(9), below, the SLA and our then current Support Call Process.
6. SaaS Services.
 - 6.1 Our SaaS Services are audited at least yearly in accordance with the AICPA's Statement on Standards for Attestation Engagements ("SSAE") No. 21. We have attained, and will maintain, SOC 1 and SOC 2 compliance, or its equivalent, for so long as you are timely paying for SaaS Services. The scope of audit coverage varies for some Tyler Software solutions. Upon execution of a mutually agreeable Non-Disclosure Agreement ("NDA"), we will provide you with a summary of our compliance report(s) or its equivalent. Every year thereafter, for so long as the

NDA is in effect and in which you make a written request, we will provide that same information. If our SaaS Services are provided using a 3rd party data center, we will provide available compliance reports for that data center.

- 6.2 You will be hosted on shared hardware in a Tyler data center or in a third-party data center. In either event, databases containing your Data will be dedicated to you and inaccessible to our other customers.
- 6.3 Our Tyler data centers have fully-redundant telecommunications access, electrical power, and the required hardware to provide access to the Tyler Software in the event of a disaster or component failure. In the event of a data center failure, we reserve the right to employ our disaster recovery plan for resumption of the SaaS Services. In that event, we commit to a Recovery Point Objective (“RPO”) of 24 hours and a Recovery Time Objective (“RTO”) of 24 hours. RPO represents the maximum duration of time between the most recent recoverable copy of your hosted Data and subsequent data center failure. RTO represents the maximum duration of time following data center failure within which your access to the Tyler Software must be restored.
- 6.4 We conduct annual penetration testing of either the production network and/or web application to be performed. We will maintain industry standard intrusion detection and prevention systems to monitor malicious activity in the network and to log and block any such activity. We will provide you with a written or electronic record of the actions taken by us in the event that any unauthorized access to your database(s) is detected as a result of our security protocols. We will undertake an additional security audit, on terms and timing to be mutually agreed to by the parties, at your written request. You may not attempt to bypass or subvert security restrictions in the SaaS Services or environments related to the Tyler Software. Unauthorized attempts to access files, passwords or other confidential information, and unauthorized vulnerability and penetration test scanning of our network and systems (hosted or otherwise) is prohibited without the prior written approval of our IT Security Officer.
- 6.5 We test our disaster recovery plan on an annual basis. Our standard test is not client-specific. Should you request a client-specific disaster recovery test, we will work with you to schedule and execute such a test on a mutually agreeable schedule. At your written request, we will provide test results to you within a commercially reasonable timeframe after receipt of the request.
- 6.6 We will be responsible for importing back-up and verifying that you can log-in. You will be responsible for running reports and testing critical processes to verify the returned Data.
- 6.7 We provide secure Data transmission paths between each of your workstations and our servers.
- 6.8 Tyler data centers are accessible only by authorized personnel with a unique key entry. All other visitors to Tyler data centers must be signed in and accompanied by authorized personnel. Entry attempts to the data center are regularly audited by internal staff and external auditors to ensure no unauthorized access.
- 6.9 Where applicable with respect to our applications that take or process card payment data, we

are responsible for the security of cardholder data that we possess, including functions relating to storing, processing, and transmitting of the cardholder data and affirm that, as of the Effective Date, we comply with applicable requirements to be considered PCI DSS compliant and have performed the necessary steps to validate compliance with the PCI DSS. We agree to supply the current status of our PCI DSS compliance program in the form of an official Attestation of Compliance, which can be found at <https://www.tylertech.com/about-us/compliance>, and in the event of any change in our status, will comply with applicable notice requirements.

7. License Rights Terminate Upon Migration. When Tyler makes Tyler Software identified in the Investment Summary (the “Evergreen Modules”) and licensed pursuant to this Agreement available to the Client for use in live production, the license to the Tyler software listed in Exhibit A, Schedule 1 (hereafter, “Migration Modules”) terminates, as do Tyler’s maintenance, support, and/or update obligations for such software.

SECTION C –PROFESSIONAL SERVICES

1. Professional Services. We will provide you the various implementation-related services itemized in the Investment Summary and described in the Statement of Work.
2. Professional Services Fees. You agree to pay us the professional services fees in the amounts set forth in the Investment Summary. Those amounts are payable in accordance with our Invoicing and Payment Policy. You acknowledge that the fees stated in the Investment Summary are good-faith estimates of the amount of time and materials required for your implementation. We will bill you the actual fees incurred based on the in-scope services provided to you. Any discrepancies in the total values set forth in the Investment Summary will be resolved by multiplying the applicable hourly rate by the quoted hours.
3. Additional Services. The Investment Summary contains, and the Statement of Work describes, the scope of services and related costs (including programming and/or interface estimates) required for the project based on our understanding of the specifications you supplied. If additional work is required, or if you use or request additional services, we will provide you with an addendum or change order, as applicable, outlining the costs for the additional work. The price quotes in the addendum or change order will be valid for thirty (30) days from the date of the quote.
4. Cancellation. If you cancel services less than four (4) weeks in advance (other than for Force Majeure or breach by us), you will be liable for all (a) daily fees associated with cancelled professional services if we are unable to reassign our personnel and (b) any non-refundable travel expenses already incurred by us on your behalf. We will make all reasonable efforts to reassign personnel in the event you cancel within four (4) weeks of scheduled commitments.
5. Services Warranty. We will perform the services in a professional, workmanlike manner, consistent with industry standards. In the event we provide services that do not conform to this warranty, we will re-perform such services at no additional cost to you.
6. Site Access and Requirements. At no cost to us, you agree to provide us with full and free access to your personnel, facilities, and equipment as may be reasonably necessary for us to provide

implementation services, subject to any reasonable security protocols or other written policies provided to us as of the Effective Date, and thereafter as mutually agreed to by you and us.

7. Background Checks. For at least the past twelve (12) years, all of our employees have undergone criminal background checks prior to hire. All employees sign our confidentiality agreement and security policies.
8. Client Assistance. You acknowledge that the implementation of the Tyler Software is a cooperative process requiring the time and resources of your personnel. You agree to use all reasonable efforts to cooperate with and assist us as may be reasonably required to meet the agreed upon project deadlines and other milestones for implementation. This cooperation includes at least working with us to schedule the implementation-related services outlined in this Agreement. We will not be liable for failure to meet any deadlines and milestones when such failure is due to Force Majeure or to the failure by your personnel to provide such cooperation and assistance (either through action or omission).
9. Maintenance and Support. For so long as you timely pay your SaaS Fees according to the Invoicing and Payment Policy, then in addition to the terms set forth in the SLA and the Support Call Process, we will:
 - 9.1 perform our maintenance and support obligations in a professional, good, and workmanlike manner, consistent with industry standards, to resolve Defects in the Tyler Software (subject to any applicable release life cycle policy);
 - 9.2 provide support during our established support hours;
 - 9.3 maintain personnel that are sufficiently trained to be familiar with the Tyler Software and Third Party Software, if any, in order to provide maintenance and support services;
 - 9.4 make available to you all releases to the Tyler Software (including updates and enhancements) that we make generally available without additional charge to customers who have a maintenance and support agreement in effect; and
 - 9.5 provide non-Defect resolution support of prior releases of the Tyler Software in accordance with any applicable release life cycle policy.

We will use all reasonable efforts to perform support services remotely. Currently, we use a third-party secure unattended connectivity tool called Bomgar, as well as GotoAssist by Citrix. Therefore, you agree to maintain a high-speed internet connection capable of connecting us to your PCs and server(s). You agree to provide us with a login account and local administrative privileges as we may reasonably require to perform remote services. We will, at our option, use the secure connection to assist with proper diagnosis and resolution, subject to any reasonably applicable security protocols. If we cannot resolve a support issue remotely, we may be required to provide onsite services. In such event, we will be responsible for our travel expenses, unless it is determined that the reason onsite support was required was a reason outside our control. Either way, you agree to provide us with full and free access to the Tyler Software, working space, adequate facilities within a reasonable distance from the equipment, and use of machines, attachments, features, or other

equipment reasonably necessary for us to provide the maintenance and support services, all at no charge to us. We strongly recommend that you also maintain your VPN for backup connectivity purposes.

For the avoidance of doubt, SaaS Fees do not include the following services: (a) onsite support (unless Tyler cannot remotely correct a Defect in the Tyler Software, as set forth above); (b) application design; (c) other consulting services; or (d) support outside our normal business hours as listed in our then-current Support Call Process. Requested services such as those outlined in this section will be billed to you on a time and materials basis at our then current rates. You must request those services with at least one (1) weeks' advance notice.

10. Support of Migration Modules. Beginning on the commencement of the initial term as set forth in Section F (1) of this Agreement, and contingent upon Client's timely payment of annual SaaS Fees for Tyler Evergreen Modules, Client is entitled to receive, at no additional charge, maintenance and support for the Migration Modules until Tyler makes the Tyler Evergreen Modules available for use in live production.

SECTION D – THIRD PARTY PRODUCTS

1. Third Party Hardware. We will sell, deliver, and install onsite the Third Party Hardware, if you have purchased any, for the price set forth in the Investment Summary. Those amounts are payable in accordance with our Invoicing and Payment Policy.
2. Third Party Software. As part of the SaaS Services, you will receive access to the Third Party Software and related documentation for internal business purposes only. Your rights to the Third Party Software will be governed by the Third Party Terms.
3. Third Party Products Warranties.
 - 3.1 We are authorized by each Developer to grant access to the Third Party Software.
 - 3.2 The Third Party Hardware will be new and unused, and upon payment in full, you will receive free and clear title to the Third Party Hardware.
 - 3.3 You acknowledge that we are not the manufacturer of the Third Party Products. We do not warrant or guarantee the performance of the Third Party Products. However, we grant and pass through to you any warranty that we may receive from the Developer or supplier of the Third Party Products.
4. Third Party Services. If you have purchased Third Party Services, those services will be provided independent of Tyler by such third-party at the rates set forth in the Investment Summary and in accordance with our Invoicing and Payment Policy.

SECTION E - INVOICING AND PAYMENT; INVOICE DISPUTES

1. Invoicing and Payment. We will invoice you the SaaS Fees and fees for other professional services in the Investment Summary per our Invoicing and Payment Policy, subject to Section E(2).



2. Invoice Disputes. If you believe any delivered software or service does not conform to the warranties in this Agreement, you will provide us with written notice within thirty (30) days of your receipt of the applicable invoice. The written notice must contain reasonable detail of the issues you contend are in dispute so that we can confirm the issue and respond to your notice with either a justification of the invoice, an adjustment to the invoice, or a proposal addressing the issues presented in your notice. We will work with you as may be necessary to develop an action plan that outlines reasonable steps to be taken by each of us to resolve any issues presented in your notice. You may withhold payment of the amount(s) actually in dispute, and only those amounts, until we complete the action items outlined in the plan. If we are unable to complete the action items outlined in the action plan because of your failure to complete the items agreed to be done by you, then you will remit full payment of the invoice. We reserve the right to suspend delivery of all SaaS Services, including maintenance and support services, if you fail to pay an invoice not disputed as described above within fifteen (15) days of notice of our intent to do so.

SECTION F – TERM AND TERMINATION

1. Term. The initial term of this Agreement equal to the number of years indicated for SaaS Services in Exhibit A, commencing on the first day of the first month following the Effective Date, unless earlier terminated as set forth below. If no duration is indicated in Exhibit A, the initial term is one (1) year. Upon expiration of the initial term, this Agreement will renew automatically for additional one (1) year renewal terms at our then-current SaaS Fees unless terminated in writing by either party at least sixty (60) days prior to the end of the then-current renewal term. Your right to access or use the Tyler Software and the SaaS Services will terminate at the end of this Agreement.
2. Termination. This Agreement may be terminated as set forth below. In the event of termination, you will pay us for all undisputed fees and expenses related to the software, products, and/or services you have received, or we have incurred or delivered, prior to the effective date of termination. Disputed fees and expenses in all terminations other than your termination for cause must have been submitted as invoice disputes in accordance with Section E(2).
 - 2.1 Failure to Pay SaaS Fees. You acknowledge that continued access to the SaaS Services is contingent upon your timely payment of SaaS Fees. If you fail to timely pay the SaaS Fees, we may discontinue the SaaS Services and deny your access to the Tyler Software. We may also terminate this Agreement if you don't cure such failure to pay within forty-five (45) days of receiving written notice of our intent to terminate.
 - 2.2 For Cause. If you believe we have materially breached this Agreement, you will invoke the Dispute Resolution clause set forth in Section H(3). You may terminate this Agreement for cause in the event we do not cure, or create a mutually agreeable action plan to address, a material breach of this Agreement within the thirty (30) day window set forth in Section H(3).
 - 2.3 Force Majeure. Either party has the right to terminate this Agreement if a Force Majeure event suspends performance of the SaaS Services for a period of forty-five (45) days or more.
 - 2.4 Lack of Appropriations. If you should not appropriate or otherwise make available funds sufficient to utilize the SaaS Services, you may unilaterally terminate this Agreement upon thirty

(30) days written notice to us. You will not be entitled to a refund or offset of previously paid, but unused SaaS Fees. You agree not to use termination for lack of appropriations as a substitute for termination for convenience.

SECTION G – INDEMNIFICATION, LIMITATION OF LIABILITY AND INSURANCE

1. Intellectual Property Infringement Indemnification.

- 1.1 We will defend you against any third party claim(s) that the Tyler Software or Documentation infringes that third party's patent, copyright, or trademark, or misappropriates its trade secrets, and will pay the amount of any resulting adverse final judgment (or settlement to which we consent). You must notify us promptly in writing of the claim and give us sole control over its defense or settlement. You agree to provide us with reasonable assistance, cooperation, and information in defending the claim at our expense.
- 1.2 Our obligations under this Section G(1) will not apply to the extent the claim or adverse final judgment is based on your use of the Tyler Software in contradiction of this Agreement, including with non-licensed third parties, or your willful infringement.
- 1.3 If we receive information concerning an infringement or misappropriation claim related to the Tyler Software, we may, at our expense and without obligation to do so, either: (a) procure for you the right to continue its use; (b) modify it to make it non-infringing; or (c) replace it with a functional equivalent, in which case you will stop running the allegedly infringing Tyler Software immediately. Alternatively, we may decide to litigate the claim to judgment, in which case you may continue to use the Tyler Software consistent with the terms of this Agreement.
- 1.4 If an infringement or misappropriation claim is fully litigated and your use of the Tyler Software is enjoined by a court of competent jurisdiction, in addition to paying any adverse final judgment (or settlement to which we consent), we will, at our option, either: (a) procure the right to continue its use; (b) modify it to make it non-infringing; or (c) replace it with a functional equivalent. This section provides your exclusive remedy for third party copyright, patent, or trademark infringement and trade secret misappropriation claims.

2. General Indemnification.

- 2.1 We will indemnify and hold harmless you and your agents, officials, and employees from and against any and all third-party claims, losses, liabilities, damages, costs, and expenses (including reasonable attorney's fees and costs) for (a) personal injury or property damage to the extent caused by our negligence or willful misconduct; or (b) our violation of PCI-DSS requirements or a law applicable to our performance under this Agreement. You must notify us promptly in writing of the claim and give us sole control over its defense or settlement. You agree to provide us with reasonable assistance, cooperation, and information in defending the claim at our expense.
- 2.2 To the extent permitted by applicable law, you will indemnify and hold harmless us and our agents, officials, and employees from and against any and all third-party claims, losses, liabilities, damages, costs, and expenses (including reasonable attorney's fees and costs) for

personal injury or property damage to the extent caused by your negligence or willful misconduct; or (b) your violation of a law applicable to your performance under this Agreement. We will notify you promptly in writing of the claim and will give you sole control over its defense or settlement. We agree to provide you with reasonable assistance, cooperation, and information in defending the claim at your expense.

3. **DISCLAIMER.** EXCEPT FOR THE EXPRESS WARRANTIES PROVIDED IN THIS AGREEMENT AND TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, WE HEREBY DISCLAIM ALL OTHER WARRANTIES AND CONDITIONS, WHETHER EXPRESS, IMPLIED, OR STATUTORY, INCLUDING, BUT NOT LIMITED TO, ANY IMPLIED WARRANTIES, DUTIES, OR CONDITIONS OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. CLIENT UNDERSTANDS AND AGREES THAT TYLER DISCLAIMS ANY LIABILITY FOR ERRORS THAT RELATE TO USER ERROR.
4. **LIMITATION OF LIABILITY.** EXCEPT AS OTHERWISE EXPRESSLY SET FORTH IN THIS AGREEMENT, OUR LIABILITY FOR DAMAGES ARISING OUT OF THIS AGREEMENT, WHETHER BASED ON A THEORY OF CONTRACT OR TORT, INCLUDING NEGLIGENCE AND STRICT LIABILITY, SHALL BE LIMITED TO YOUR ACTUAL DIRECT DAMAGES, NOT TO EXCEED (A) DURING THE INITIAL TERM, AS SET FORTH IN SECTION F(1), TOTAL FEES PAID AS OF THE TIME OF THE CLAIM; OR (B) DURING ANY RENEWAL TERM, THE THEN-CURRENT ANNUAL SAAS FEES PAYABLE IN THAT RENEWAL TERM. THE PARTIES ACKNOWLEDGE AND AGREE THAT THE PRICES SET FORTH IN THIS AGREEMENT ARE SET IN RELIANCE UPON THIS LIMITATION OF LIABILITY AND TO THE MAXIMUM EXTENT ALLOWED UNDER APPLICABLE LAW, THE EXCLUSION OF CERTAIN DAMAGES, AND EACH SHALL APPLY REGARDLESS OF THE FAILURE OF AN ESSENTIAL PURPOSE OF ANY REMEDY. THE FOREGOING LIMITATION OF LIABILITY SHALL NOT APPLY TO CLAIMS THAT ARE SUBJECT TO SECTIONS G(1) AND G(2).
5. **EXCLUSION OF CERTAIN DAMAGES.** TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT SHALL WE BE LIABLE FOR ANY SPECIAL, INCIDENTAL, PUNITIVE, INDIRECT, OR CONSEQUENTIAL DAMAGES WHATSOEVER, EVEN IF WE HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.
6. **Insurance.** During the course of performing services under this Agreement, we agree to maintain the following levels of insurance: (a) Commercial General Liability of at least \$1,000,000; (b) Automobile Liability of at least \$1,000,000; (c) Professional Liability of at least \$1,000,000; (d) Workers Compensation complying with applicable statutory requirements; and (e) Excess/Umbrella Liability of at least \$5,000,000. We will add you as an additional insured to our Commercial General Liability and Automobile Liability policies, which will automatically add you as an additional insured to our Excess/Umbrella Liability policy as well. We will provide you with copies of certificates of insurance upon your written request.

SECTION H – GENERAL TERMS AND CONDITIONS

1. **Additional Products and Services.** You may purchase additional products and services at the rates set forth in the Investment Summary for twelve (12) months from the Effective Date by executing a mutually agreed addendum. If no rate is provided in the Investment Summary, or those twelve (12) months have expired, you may purchase additional products and services at our then-current list price, also by executing a mutually agreed addendum. The terms of this Agreement will control any

such additional purchase(s), unless otherwise specifically provided in the addendum.

2. Optional Items. Pricing for any listed optional products and services in the Investment Summary will be valid for twelve (12) months from the Effective Date.
3. Dispute Resolution. You agree to provide us with written notice within thirty (30) days of becoming aware of a dispute. You agree to cooperate with us in trying to reasonably resolve all disputes, including, if requested by either party, appointing a senior representative to meet and engage in good faith negotiations with our appointed senior representative. Senior representatives will convene within thirty (30) days of the written dispute notice, unless otherwise agreed. All meetings and discussions between senior representatives will be deemed confidential settlement discussions not subject to disclosure under Federal Rule of Evidence 408 or any similar applicable state rule. If we fail to resolve the dispute, then the parties shall participate in non-binding mediation in an effort to resolve the dispute. If the dispute remains unresolved after mediation, then either of us may assert our respective rights and remedies in a court of competent jurisdiction. Nothing in this section shall prevent you or us from seeking necessary injunctive relief during the dispute resolution procedures.
4. Taxes. The fees in the Investment Summary do not include any taxes, including, without limitation, sales, use, or excise tax. If you are a tax-exempt entity, you agree to provide us with a tax-exempt certificate. Otherwise, we will pay all applicable taxes to the proper authorities and you will reimburse us for such taxes. If you have a valid direct-pay permit, you agree to provide us with a copy. For clarity, we are responsible for paying our income taxes, both federal and state, as applicable, arising from our performance of this Agreement.
5. Nondiscrimination. We will not discriminate against any person employed or applying for employment concerning the performance of our responsibilities under this Agreement. This discrimination prohibition will apply to all matters of initial employment, tenure, and terms of employment, or otherwise with respect to any matter directly or indirectly relating to employment concerning race, color, religion, national origin, age, sex, sexual orientation, ancestry, disability that is unrelated to the individual's ability to perform the duties of a particular job or position, height, weight, marital status, or political affiliation. We will post, where appropriate, all notices related to nondiscrimination as may be required by applicable law.
6. E-Verify. We have complied, and will comply, with the E-Verify procedures administered by the U.S. Citizenship and Immigration Services Verification Division for all of our employees assigned to your project.
7. Subcontractors. We will not subcontract any services under this Agreement without your prior written consent, not to be unreasonably withheld.
8. Binding Effect; No Assignment. This Agreement shall be binding on, and shall be for the benefit of, either your or our successor(s) or permitted assign(s). Neither party may assign this Agreement without the prior written consent of the other party; provided, however, your consent is not required for an assignment by us as a result of a corporate reorganization, merger, acquisition, or purchase of substantially all of our assets.

9. Force Majeure. Except for your payment obligations, neither party will be liable for delays in performing its obligations under this Agreement to the extent that the delay is caused by Force Majeure; provided, however, that within ten (10) business days of the Force Majeure event, the party whose performance is delayed provides the other party with written notice explaining the cause and extent thereof, as well as a request for a reasonable time extension equal to the estimated duration of the Force Majeure event.
10. No Intended Third Party Beneficiaries. This Agreement is entered into solely for the benefit of you and us. No third party will be deemed a beneficiary of this Agreement, and no third party will have the right to make any claim or assert any right under this Agreement. This provision does not affect the rights of third parties under any Third Party Terms.
11. Entire Agreement; Amendment. This Agreement represents the entire agreement between you and us with respect to the subject matter hereof, and supersedes any prior agreements, understandings, and representations, whether written, oral, expressed, implied, or statutory. Purchase orders submitted by you, if any, are for your internal administrative purposes only, and the terms and conditions contained in those purchase orders will have no force or effect. This Agreement may only be modified by a written amendment signed by an authorized representative of each party.
12. Severability. If any term or provision of this Agreement is held invalid or unenforceable, the remainder of this Agreement will be considered valid and enforceable to the fullest extent permitted by law.
13. No Waiver. In the event that the terms and conditions of this Agreement are not strictly enforced by either party, such non-enforcement will not act as or be deemed to act as a waiver or modification of this Agreement, nor will such non-enforcement prevent such party from enforcing each and every term of this Agreement thereafter.
14. Independent Contractor. We are an independent contractor for all purposes under this Agreement.
15. Notices. All notices or communications required or permitted as a part of this Agreement, such as notice of an alleged material breach for a termination for cause or a dispute that must be submitted to dispute resolution, must be in writing and will be deemed delivered upon the earlier of the following: (a) actual receipt by the receiving party; (b) upon receipt by sender of a certified mail, return receipt signed by an employee or agent of the receiving party; (c) upon receipt by sender of proof of email delivery; or (d) if not actually received, five (5) days after deposit with the United States Postal Service authorized mail center with proper postage (certified mail, return receipt requested) affixed and addressed to the other party at the address set forth on the signature page hereto or such other address as the party may have designated by proper notice. The consequences for the failure to receive a notice due to improper notification by the intended receiving party of a change in address will be borne by the intended receiving party.
16. Client Lists. You agree that we may identify you by name in client lists, marketing presentations, and promotional materials.
17. Confidentiality. Both parties recognize that their respective employees and agents, in the course of performance of this Agreement, may be exposed to confidential information and that disclosure of

such information could violate rights to private individuals and entities, including the parties. Confidential information is nonpublic information that a reasonable person would believe to be confidential and includes, without limitation, personal identifying information (*e.g.*, social security numbers) and trade secrets, each as defined by applicable state law. Each party agrees that it will not disclose any confidential information of the other party and further agrees to take all reasonable and appropriate action to prevent such disclosure by its employees or agents. The confidentiality covenants contained herein will survive the termination or cancellation of this Agreement. This obligation of confidentiality will not apply to information that:

- (a) is in the public domain, either at the time of disclosure or afterwards, except by breach of this Agreement by a party or its employees or agents;
- (b) a party can establish by reasonable proof was in that party's possession at the time of initial disclosure;
- (c) a party receives from a third party who has a right to disclose it to the receiving party; or
- (d) is the subject of a legitimate disclosure request under the open records laws, the Public Records Act per RCW 42.56, or similar applicable public disclosure laws governing this Agreement; provided, however, that in the event you receive an open records, public records request, or other similar applicable request, you will give us prompt notice and otherwise perform the functions required by applicable law.

18. Quarantining of Client Data. Some services provided by Tyler require us to be in possession of your Data. In the event we detect malware or other conditions associated with your Data that are reasonably suspected of putting Tyler resources or other Tyler clients' data at risk, we reserve the absolute right to move your Data from its location within a multi-tenancy Tyler hosted environment to an isolated "quarantined" environment without advance notice. Your Data will remain in such quarantine for a period of at least six (6) months during which time we will review the Data, and all traffic associated with the Data, for signs of malware or other similar issues. If no issues are detected through such reviews during the six (6) month period of quarantine, we will coordinate with you the restoration of your Data to a non-quarantined environment. In the event your Data must remain in quarantine beyond this six (6) month period through no fault of Tyler's, we reserve the right to require payment of additional fees for the extended duration of quarantine. We will provide an estimate of what those costs will be upon your request.
19. Business License. In the event a local business license is required for us to perform services hereunder, you will promptly notify us and provide us with the necessary paperwork and/or contact information so that we may timely obtain such license.
20. Governing Law. This Agreement will be governed by and construed in accordance with the laws of your state of domicile, without regard to its rules on conflicts of law.
21. Multiple Originals and Authorized Signatures. This Agreement may be executed in multiple originals, any of which will be independently treated as an original document. Any electronic, faxed, scanned, photocopied, or similarly reproduced signature on this Agreement or any amendment hereto will be deemed an original signature and will be fully enforceable as if an original signature. Each party represents to the other that the signatory set forth below is duly authorized to bind that party to this Agreement.
22. Cooperative Procurement. To the maximum extent permitted by applicable law, we agree that this

Agreement may be used as a cooperative procurement vehicle by eligible jurisdictions. We reserve the right to negotiate and customize the terms and conditions set forth herein, including but not limited to pricing, to the scope and circumstances of that cooperative procurement.

23. Data & Insights Solution Terms. Your use of certain Tyler solutions includes Tyler's Data & Insights data platform. Your rights, and the rights of any of your end users, to use Tyler's Data & Insights data platform is subject to the Data & Insights SaaS Services Terms of Service, available at <https://www.tylertech.com/terms/data-insights-saas-services-terms-of-service>. By signing a Tyler Agreement or Order Form, or accessing, installing, or using any of the Tyler solutions listed at the linked terms, you certify that you have reviewed, understand, and agree to said terms.

24. Contract Documents. This Agreement includes the following exhibits:

Exhibit A	Investment Summary
	Schedule 1: Migration Modules
Exhibit B	Invoicing and Payment Policy
	Schedule 1: Business Travel Policy
Exhibit C	Service Level Agreement
	Schedule 1: Support Call Process
Exhibit D	Third Party Terms
Exhibit E	Statement of Work
Exhibit F	Data-Sharing Agreement

IN WITNESS WHEREOF, a duly authorized representative of each party has executed this Agreement as of the date(s) set forth below.

Tyler Technologies, Inc.

City of Bonney Lake, Washington

By: _____

By: _____

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

Address for Notices:

Tyler Technologies, Inc.
One Tyler Drive
Yarmouth, ME 04096
Attention: Chief Legal Officer

Address for Notices:

City of Bonney Lake, Washington
PO Box 7380
Bonney Lake, Washington 98391-0944
Attention: _____





Exhibit A

Investment Summary

The following Investment Summary details the software and services to be delivered by us to you under the Agreement. This Investment Summary is effective as of the Effective Date, despite any expiration date in the Investment Summary that may have lapsed as of the Effective Date. Capitalized terms not otherwise defined will have the meaning assigned to such terms in the Agreement. In the event of conflict between the Agreement and terms in the Comments section of this Investment Summary, the language in the Agreement will prevail.

Tyler sales quotation to be inserted prior to Agreement execution.

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Quoted By: Chris Deroche
 Quote Expiration: 10/31/24
 Quote Name: City of Bonney Lake-ERP-Munis
 Quote Description: EERP ETA EPL 7.30.24
 SaaS Term: 1.00

Sales Quotation For:**Shipping Address:**

City of Bonney Lake
 PO Box 7380
 Bonney Lake WA 98391-0944

Tyler SaaS and Related Services

Description	Qty	Imp. Hours	Annual Fee
Financial Management			
Accounting	1	192	\$ 25,057.00
Accounts Payable	1	40	\$ 6,916.00
Budgeting	1	56	\$ 6,920.00
Capital Assets	1	40	\$ 5,766.00
Cash Management	1	40	\$ 4,358.00
Contract Management	1	32	\$ 2,720.00
eProcurement (Vendor Access and Punch-Out)	1	16	\$ 4,902.00
Project & Grant Accounting	1	40	\$ 4,716.00
Purchasing	1	88	\$ 10,270.00
Human Resources Management			
Advanced Scheduling w Mobile Access - Up to 250 Employees	1	104	\$ 10,622.00
Human Resources & Talent Management	1	128	\$ 4,339.00
Payroll with Employee Access	1	208	\$ 6,250.00
Time & Attendance w Mobile Access - Up to 250 Employees	1	136	\$ 9,505.00
Revenue Management			

Accounts Receivable	1	64	\$ 5,097.00
Cashiering	1	40	\$ 9,248.00
Central Property File	1	8	\$ 820.00
General Billing	1	32	\$ 3,307.00
Resident Access	1	48	\$ 6,212.00
Utility Billing CIS	1	176	\$ 4,253.00
Utility Billing Meter Interface	1	8	\$ 1,340.00
Civic Services			
Civic Access - Community Development	1	24	\$ 7,823.00
Community Development Suite	15	288	\$ 22,905.00
Decision Engine	1	8	\$ 7,482.00
e-Reviews	1	80	\$ 11,264.00
Enterprise Permitting & Licensing Advanced Automation Bundle	1	8	\$ 1,675.00
Enterprise Permitting & Licensing Core Foundation Bundle	1	8	\$ 2,290.00
Enterprise Permitting & Licensing Mobile	5	8	\$ 2,550.00
Parks and Recreation	1	80	\$ 9,496.00
Report Toolkit	1	0	\$ 2,276.00
Content Management			
Content Manager Core includes Onboarding	1	24	\$ 10,810.00
Data Insights			
Enterprise Analytics and Reporting w Executive Insights	1	80	\$ 17,663.00
Additional			
Enterprise Forms Processing Software (including Common Form Set)	1	0	\$ 6,278.00
GIS	15	8	\$ 3,825.00
Notify includes 50,000 Msgs and 1,650 Mins per year	1	40	\$ 8,600.00
Sub-Total:			\$ 247,555.00
<i>Less Discount:</i>			<i>\$ 27,874.00</i>
TOTAL		2152	\$ 219,681.00

Professional Services

Description	Quantity	Unit Price	Ext Discount	Extended Price	Maintenance
Applicant Tracking Import Hours	12	\$ 200.00	\$ 1,200.00	\$ 1,200.00	\$ 0.00
Capital Assets Import Hours	16	\$ 200.00	\$ 1,600.00	\$ 1,600.00	\$ 0.00
COA Import Hours	12	\$ 200.00	\$ 1,200.00	\$ 1,200.00	\$ 0.00
Custom Report Writing	80	\$ 175.00	\$ 0.00	\$ 14,000.00	\$ 0.00
Executive Insights Implementation	1	\$ 8,400.00	\$ 0.00	\$ 8,400.00	\$ 0.00
Payroll Accruals Import Hours	16	\$ 200.00	\$ 1,600.00	\$ 1,600.00	\$ 0.00
Payroll Deductions Import Hours	16	\$ 200.00	\$ 1,600.00	\$ 1,600.00	\$ 0.00
Payroll Employee Master Import Hours	16	\$ 200.00	\$ 1,600.00	\$ 1,600.00	\$ 0.00
Position Control Import Hours	12	\$ 200.00	\$ 1,200.00	\$ 1,200.00	\$ 0.00
State Retirement Tables Import Hours	12	\$ 200.00	\$ 1,200.00	\$ 1,200.00	\$ 0.00
Conversions – See Detailed Breakdown Below				\$ 46,575.00	\$ 0.00
Project Management	364	\$ 175.00	\$ 0.00	\$ 63,700.00	\$ 0.00
Onsite Implementation	576	\$ 200.00	\$ 0.00	\$ 115,200.00	\$ 0.00
Remote Implementation	1576	\$ 175.00	\$ 0.00	\$ 275,800.00	\$ 0.00
TOTAL				\$ 534,875.00	\$ 0.00

Payments

	Use Case	List Price	Service %	Min	Basis Points	Rate	Cap	POS	Online	IVR
Payments - Client Card Cost - Interchange Plus										
Enterprise ERP										
Enterprise ERP Payments	General Billing				0.40%	\$ 0.40		X	X	
Enterprise ERP Payments	Utility Billing				0.40%	\$ 0.40		X	X	X
Enterprise Permitting & Licensing Payments	Code Enforcement				0.40%	\$ 0.40		X	X	
Enterprise Permitting & Licensing Payments	Licenses				0.40%	\$ 0.40		X	X	
Enterprise Permitting & Licensing Payments	Planning				0.40%	\$ 0.40		X	X	
Enterprise Permitting & Licensing Payments	Permits				0.40%	\$ 0.40		X	X	

Parks and Rec Payments	TPAR	0.40%	\$ 0.40
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Payments - Other Fees

Enterprise ERP

Client eCheck Cost	\$ 1.95
eCheck Rejects	\$ 5.00
Credit Card Chargebacks	\$ 15.00

Client Card Cost - Interchange Plus	Per card transaction with Visa, MasterCard, Discover, and American Express for all transactions on top of industry-driven rates for bank fees, card brand fees, interchange fees, dues, assessments, and other processing fees.
Enterprise ERP Payments	IVR Cost - Additional \$0.50 per transaction on top of Card and eCheck fee.
Client eCheck Cost	Per electronic check transaction.
eCheck Rejects	When an eCheck transaction comes back as declined (e.g bounced check)
Credit Card Chargebacks	If a card payer disputes a transaction at the card issuing bank (e.g. stolen card)

3rd Party Hardware, Software and Services

Description	Qty	Unit Price	Unit Discount	Total Price	Unit Maint/SaaS	Unit Discount	Total Maint/SaaS
Pattern Stream Automated Document System - Implementation	64	\$ 185.00	\$ 0.00	\$ 11,840.00	\$ 0.00	\$ 0.00	\$ 0.00
Pattern Stream Automated Document System - SaaS	1	\$ 0.00	\$ 0.00	\$ 0.00	\$ 15,480.00	\$ 0.00	\$ 15,480.00
Payments Lane 7000 Terminal Purchase	1	\$ 529.00	\$ 0.00	\$ 529.00	\$ 0.00	\$ 0.00	\$ 0.00
Payments PCI Service Fee (Per Device)	1	\$ 0.00	\$ 0.00	\$ 0.00	\$ 180.00	\$ 0.00	\$ 180.00
TOTAL				\$ 12,369.00			\$ 15,660.00

Summary

One Time Fees

Recurring Fees

Total Tyler License Fees	\$ 0.00	\$ 0.00
Total SaaS	\$ 0.00	\$ 219,681.00
Total Tyler Services	\$ 534,875.00	\$ 0.00
Total Third-Party Hardware, Software, Services	\$ 12,369.00	\$ 15,660.00

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Summary Total	\$ 547,244.00	\$ 235,341.00
Contract Total	\$ 782,585.00	
Estimated Travel Expenses excl in Contract Total	\$ 32,880.00	

Unless otherwise indicated in the contract or amendment thereto, pricing for optional items will be held For six (6) months from the Quote date or the Effective Date of the Contract, whichever is later.

Customer Approval: _____ Date: _____

Print Name: _____ P.O.#: _____

All Primary values quoted in US Dollars

Detailed Breakdown of Conversions (Included in Summary Total)

Description	Qty	Unit Price	Unit Discount	Extended Price
Conversions				
Community Development	1	\$ 16,450.00	\$ 8,225.00	\$ 8,225.00
Financials				
Accounting	1	\$ 5,000.00	\$ 2,500.00	\$ 2,500.00
Accounts Payable	1	\$ 7,600.00	\$ 3,800.00	\$ 3,800.00
Contracts	1	\$ 4,000.00	\$ 2,000.00	\$ 2,000.00
Project Accounting	1	\$ 5,000.00	\$ 2,500.00	\$ 2,500.00
Purchase Orders	1	\$ 5,400.00	\$ 2,700.00	\$ 2,700.00
Human Resources Management				
Human Resources Management	1	\$ 14,300.00	\$ 7,150.00	\$ 7,150.00
Revenue Management				
General Billing	1	\$ 8,200.00	\$ 4,100.00	\$ 4,100.00
Utility Billing	1	\$ 27,200.00	\$ 13,600.00	\$ 13,600.00
TOTAL				\$ 46,575.00

Optional Tyler SaaS and Related Services

Description	Qty	Imp. Hours	Annual Fee
Financial Management			
Assets Mobile	1	16	\$ 4,672.00
Bid Management	1	32	\$ 3,224.00
Inventory	1	52	\$ 6,234.00
Human Resources Management			
Recruiting	1	16	\$ 1,104.00
Revenue Management			
Utility Billing Special Assessments	1	32	\$ 2,015.00
Civic Services			
My Civic	1	56	\$ 10,000.00
Data Insights			
Open Finance	1	0	\$ 16,000.00
TOTAL:		204	\$ 43,249.00

Optional Professional Services

Description	Quantity	Unit Price	Ext. Discount	Extended Price	Maintenance
Install Fee - Open Finance	1	\$ 5,600.00	\$ 0.00	\$ 5,600.00	\$ 0.00
Onsite Implementation	56	\$ 200.00	\$ 0.00	\$ 11,200.00	\$ 0.00
Remote Implementation	148	\$ 175.00	\$ 0.00	\$ 25,900.00	\$ 0.00
TOTAL				\$ 42,700.00	\$ 0.00

Optional 3rd Party Hardware, Software and Services

Description	Qty	Unit Price	Unit Discount	Total Price	Unit Maint/SaaS	Unit Maint/SaaS Discount	Total Maint/SaaS
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Barcode Printer Kit	1	\$ 1,445.00	\$ 0.00	\$ 1,445.00	\$ 145.00	\$ 0.00	\$ 145.00
Barcode Scanner - NX6 Rugged Mobile Scanning Device	1	\$ 1,695.00	\$ 0.00	\$ 1,695.00	\$ 170.00	\$ 0.00	\$ 170.00
TOTAL				\$ 3,140.00			\$ 315.00

Tyler Annual Discount Detail (Excludes Optional Products)

Description	Annual Fee	Annual Fee Discount	Annual Fee Net
Financial Management			
Accounting	\$ 25,057.00	\$ 6,014.00	\$ 19,043.00
Accounts Payable	\$ 6,916.00	\$ 1,660.00	\$ 5,256.00
Budgeting	\$ 6,920.00	\$ 1,661.00	\$ 5,259.00
Capital Assets	\$ 5,766.00	\$ 0.00	\$ 5,766.00
Cash Management	\$ 4,358.00	\$ 0.00	\$ 4,358.00
Contract Management	\$ 2,720.00	\$ 0.00	\$ 2,720.00
eProcurement (Vendor Access and Punch-Out)	\$ 4,902.00	\$ 0.00	\$ 4,902.00
Project & Grant Accounting	\$ 4,716.00	\$ 1,132.00	\$ 3,584.00
Purchasing	\$ 10,270.00	\$ 2,465.00	\$ 7,805.00
Human Resources Management			
Advanced Scheduling w Mobile Access - Up to 250 Employees	\$ 10,622.00	\$ 0.00	\$ 10,622.00
Human Resources & Talent Management	\$ 4,339.00	\$ 1,041.00	\$ 3,298.00
Payroll with Employee Access	\$ 6,250.00	\$ 1,500.00	\$ 4,750.00
Time & Attendance w Mobile Access - Up to 250 Employees	\$ 9,505.00	\$ 2,281.00	\$ 7,224.00
Revenue Management			
Accounts Receivable	\$ 5,097.00	\$ 1,223.00	\$ 3,874.00
Cashiering	\$ 9,248.00	\$ 2,220.00	\$ 7,028.00
Central Property File	\$ 820.00	\$ 197.00	\$ 623.00
General Billing	\$ 3,307.00	\$ 794.00	\$ 2,513.00
Resident Access	\$ 6,212.00	\$ 0.00	\$ 6,212.00
Utility Billing CIS	\$ 4,253.00	\$ 1,021.00	\$ 3,232.00

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Utility Billing Meter Interface	\$ 1,340.00	\$ 322.00	\$ 1,018.00
Civic Services			
Civic Access - Community Development	\$ 7,823.00	\$ 0.00	\$ 7,823.00
Community Development Suite	\$ 22,905.00	\$ 0.00	\$ 22,905.00
Decision Engine	\$ 7,482.00	\$ 0.00	\$ 7,482.00
e-Reviews	\$ 11,264.00	\$ 0.00	\$ 11,264.00
Enterprise Permitting & Licensing Advanced Automation Bundle	\$ 1,675.00	\$ 0.00	\$ 1,675.00
Enterprise Permitting & Licensing Core Foundation Bundle	\$ 2,290.00	\$ 0.00	\$ 2,290.00
Enterprise Permitting & Licensing Mobile	\$ 2,550.00	\$ 0.00	\$ 2,550.00
Parks and Recreation	\$ 9,496.00	\$ 2,279.00	\$ 7,217.00
Report Toolkit	\$ 2,276.00	\$ 0.00	\$ 2,276.00
Content Management			
Content Manager Core includes Onboarding	\$ 10,810.00	\$ 0.00	\$ 10,810.00
Data Insights			
Enterprise Analytics and Reporting w Executive Insights	\$ 17,663.00	\$ 0.00	\$ 17,663.00
Additional			
Enterprise Forms Processing Software (including Common Form Set)	\$ 6,278.00	\$ 0.00	\$ 6,278.00
GIS	\$ 3,825.00	\$ 0.00	\$ 3,825.00
Notify includes 50,000 Msgs and 1,650 Mins per year	\$ 8,600.00	\$ 2,064.00	\$ 6,536.00
TOTAL	\$ 247,555.00	\$ 27,874.00	\$ 219,681.00

Comments

Tyler's quote contains estimates of the amount of services needed, based on our preliminary understanding of the scope, level of engagement, and timeline as defined in the Statement of Work (SOW) for your project. The actual amount of services required may vary, based on these factors.

Tyler's pricing is based on the scope of proposed products and services contracted from Tyler. Should portions of the scope of products or services be altered by the Client, Tyler reserves the right to adjust prices for the remaining scope accordingly.

Unless otherwise noted, prices submitted in the quote do not include travel expenses incurred in accordance with Tyler's then-current Business Travel Policy.

Tyler's prices do not include applicable local, city or federal sales, use excise, personal property or other similar taxes or duties, which you are responsible for determining and remitting. Installations are completed remotely but can be done onsite upon request at an additional cost.

In the event Client cancels services less than four (4) weeks in advance, Client is liable to Tyler for (i) all non-refundable expenses incurred by Tyler on Client's behalf; and (ii) daily fees associated with the cancelled services if Tyler is unable to re-assign its personnel.

The Implementation Hours included in this quote assume a work split effort of 70% Client and 30% Tyler.

Implementation Hours are scheduled and delivered in four (4) or eight (8) hour increments.

Tyler provides onsite training for a maximum of 12 people per class. In the event that more than 12 users wish to participate in a training class or more than one occurrence of a class is needed, Tyler will either provide additional days at then-current rates for training or Tyler will utilize a Train-the-Trainer approach whereby the client designated attendees of the initial training can thereafter train the remaining users.

As a new Tyler client, you are entitled to a 14-day or a 30-day trial of the Managed Detection and Response cybersecurity service. Please reference <https://www.tylertech.com/services/tyler-detect> for more information on the service and contact CybersecuritySales@tylertech.com to initiate the trial.

Tyler currently supports the following identity providers (IdP's) for use with Tyler back-office solutions: Microsoft Active Directory through Azure AD, ADFS or Okta AD agent, Google Cloud Identity, Okta, and Identity Automation Rapid Identity. Any requirement by you to use an IdP not supported by Tyler will require additional costs, available upon request.

Community Development: Tyler leads and owns the "Assess and Define" and "Configuration" 4 unique business transactions, 4 template business transactions, 2 geo-rules and 2 automation events. Configuration elements beyond this will be owned by the client.

Content Manager Core includes up to 1TB of storage. Should additional storage be needed it may be purchased as needed at an annual fee of \$5,000 per TB.

The SaaS fees for product that are not named users are based on 50 concurrent users. Should the number of concurrent users be exceeded, Tyler reserves the right to re-negotiate the SaaS fees based upon any resulting changes in the pricing categories.

Your payment of the annual subscription or SaaS fee for Tyler Notify will include an identified amount of messages and/or minutes annually. Additional messages and/or minutes may be purchased from Tyler in defined packages at our then-current rates. Tyler Notify will not restrict use of messages and/or minutes that exceed the allotted messages but reserves the right to invoice you for documented overages occurring during the annual term. Any unused messages or minutes remaining at the end of your annual subscription term expire.

Financial library includes: standard A/P check, standard EFT/ACH, standard Purchase order, standard Contract, 1099M, 1099INT, 1099S, 1099NEC and 1099G.

General Billing library includes: standard invoice, standard statement, standard general billing receipt and standard miscellaneous receipt.

Personnel Actions Forms Library includes: standard Personnel Action form - New and standard Personnel Action Form - Change.

Standard Project Management responsibilities include project plan creation, initial stakeholder presentation, bi-weekly status calls, updating of project plan task statuses, and go-live planning activities.

Your rights, and the rights of any of your end users, to use Tyler's Data & Insights SaaS Services, or certain Tyler solutions which include Tyler's Data & Insights data platform, are subject to the Terms of Services, available at <https://www.tylertech.com/terms/data-insights-saas-services-terms-of-service>. By signing this sales quotation, or accessing, installing, or using any of the Tyler solutions listed at the linked terms, you certify that you have reviewed, understand, and agree to said terms.

Utility billing library includes: standard Utility bill, standard UB receipt, standard UB delinquent notice, standard door hanger and standard final utility bill.

Payroll library includes: standard PR check, standard direct deposit, standard vendor from payroll check, standard vendor from payroll direct deposit, W2, W2c, ACA 1095B, ACA 1095C and 1099 R.

All hardware related to Assets Mobile and Inventory Mobile will be under a standard maintenance plan which starts when they are shipped. This includes replacement of your current hardware if it cannot be fixed through the standard helpdesk process.

Accounting conversion includes: Actuals (total balances only) up to 5 years, Budgets (total balances only) up to 5 years

Accounts Payable conversion includes: Standard - Vendors, Remit Addresses, 1099 Amounts, Check History(Header, Detail) - up to 5 years, Invoices (Header, Detail) - up to 5 years

Contracts conversion includes: Standard

General Billing conversion includes: Standard - CID, Recurring Invoices, Bills(Header, Detail), Payment History, Invoices - up to 5 years

Human Resources Management conversion includes: Standard - Employee Master, Address, Accumulators (Earnings & Deduction totals by period) - up to 5 years, Check History - up to 5 years, Earning/Deduction History - up to 5 years, PM Action History - up to 5 years, Certifications, Education

Project Accounting conversion includes: Standard, Actuals - up to 5 years, Budgets - up to 5 years

Purchase Orders conversion includes: Standard - Open POs, Closed POs - up to 5 years

In the event Client acquires from Tyler any edition of Content Manager software other than Enterprise Edition, the license for Content Manager is restricted to use with Tyler applications only. If Client wishes to use Content Manager software with non-Tyler applications, Client must purchase or upgrade to Content Manager Enterprise Edition.

Fees for year one of hardware maintenance will be invoiced as of the first day of the calendar month following the date the hardware is delivered and may be prorated to end coterminous with the Annual Support Maintenance term. Subsequent annual hardware maintenance fees shall be invoiced together with the Annual Support Maintenance term in accordance with the terms of the Agreement.

Your use of Payments and any related items included on this order is subject to the terms found at: <https://www.tylertech.com/terms/payment-card-processing-agreement>. By signing this order or the agreement in which it is included, you agree you have read, understand, and agree to such terms. Please see attached Payments fee schedule.

Utility Billing conversion includes: Standard - UB Account, CID's, Services/Meter Inventory, Assessments, Consumption History - up to 5 years, Balance Forward AR, Service Orders, Backflow, Budget Billing, Flat Inventory/Containers



**Exhibit A
Schedule 1
Migration Modules**

Purchasing Support
Tyler Cashiering Support
Human Resources Support
Tyler Payments - Hosting Fee
Position Budgeting Support
Permits & Inspections Support
Licensing Support
Parcel Manager Support
Project Accounting Support
Utility Billing Support Web
Cash Register Interface Support
Budget Preparation Support
TYLER NOTIFY with 30,000 Msgs & 1,000 Mins annually
Data Dictionaries Support
Handhelds Support
Utility Billing Support
Tyler Output Processing Support
Human Resources Support Web
Customer Request Support
Site License Support
Forms Support
Accounts Receivable Support
Permits & Inspections Support Web
Requisitions Support
Payroll Support
Licensing Support Web
GL/AP Support



Exhibit B

Invoicing and Payment Policy

We will provide you with the software and services set forth in the Investment Summary of the Agreement. Capitalized terms not otherwise defined will have the meaning assigned to such terms in the Agreement.

Invoicing: We will invoice you for the applicable software and services in the Investment Summary as set forth below. Your rights to dispute any invoice are set forth in the Agreement.

1. **SaaS Fees.** SaaS Fees are invoiced on an annual basis, beginning on the commencement of the initial term as set forth in Section F (1) of this Agreement. Your annual SaaS fees for the initial term are set forth in the Investment Summary. Upon expiration of the initial term, your annual SaaS fees will be at our then-current rates. Beginning on the commencement of the initial term, Client shall no longer be required to pay annual support fees for the Migration Modules.
2. **Other Tyler Software and Services.**
 - 2.1 *VPN Device:* The fee for the VPN device will be invoiced upon installation of the VPN.
 - 2.2 *Implementation and Other Professional Services (including training):* Implementation and other professional services (including training) are billed and invoiced as delivered, at the rates set forth in the Investment Summary.
 - 2.3 *Consulting Services:* If you have purchased any Business Process Consulting services, if they have been quoted as fixed-fee services, they will be invoiced 50% upon your acceptance of the best practice recommendations, by module, and 50% upon your acceptance of custom desktop procedures, by module. If you have purchased any Business Process Consulting services and they are quoted as an estimate, then we will bill you the actual services delivered on a time and materials basis.
 - 2.4 *Conversions:* Fixed-fee conversions are invoiced 50% upon initial delivery of the converted Data, by conversion option, and 50% upon Client acceptance to load the converted Data into Live/Production environment, by conversion option. Where conversions are quoted as estimated, we will bill you the actual services delivered on a time and materials basis.
 - 2.5 *Requested Modifications to the Tyler Software:* Requested modifications to the Tyler Software are invoiced 50% upon delivery of specifications and 50% upon delivery of the applicable modification. You must report any failure of the modification to conform to the specifications within thirty (30) days of delivery; otherwise, the modification will be deemed to be in compliance with the specifications after the 30-day window has passed. You may still report Defects to us as set forth in this Agreement.



- 2.6 *Other Fixed Price Services*: Other fixed price services are invoiced as delivered, at the rates set forth in the Investment Summary. For the avoidance of doubt, where “Project Planning Services” are provided, payment will be due upon delivery of the Implementation Planning document. Dedicated Project Management services, if any, will be billed monthly in arrears, beginning on the first day of the month immediately following initiation of project planning.
- 2.7 *Web Services*: Annual fees for web services are payable in advance, commencing upon the availability of the service. Your annual fees for the initial term are set forth in the Investment Summary. Upon expiration of the initial term, your annual fees will be at our then-current rates.
- 2.8 *Annual Services*: Unless otherwise indicated in this Exhibit B, fees for annual services are due annually, in advance, commencing on the availability of the service. Your annual fees for the initial term are set forth in the Investment Summary. Upon expiration of the initial term, your annual fees will be at our then-current rates.
3. Third Party Products and Hardware.
- 3.1 *Third Party Software License Fees*: License fees for Third Party Software, if any, are invoiced when we make it available to you for downloading.
- 3.2 *Third Party Software Maintenance*: The first year maintenance fee for the Third Party Software is invoiced when we make it available to you for downloading. Subsequent annual maintenance fees for Third Party Software are invoiced annually, in advance, at then-current rates, upon each anniversary thereof.
- 3.3 *Hardware*: Third Party Hardware costs, if any, are invoiced upon delivery.
- 3.4 *Hardware Maintenance*: The first year maintenance fee for Hardware is invoiced upon delivery of the hardware. Subsequent annual maintenance fees for hardware are invoiced annually, in advance, at then-current rates, upon each anniversary thereof.
- 3.5 *Third Party Services*: Fees for Third Party Services, if any, are invoiced as delivered, along with applicable expenses, at the rates set forth in the Investment Summary. For the avoidance of doubt, Finite Matters will invoice Client directly for any services fees for Pattern Stream.
- 3.6 *Third Party SaaS*: Third Party SaaS Services fees, if any, are invoiced annually, in advance, commencing with availability of the respective Third Party SaaS Services. Pricing for the first year of Third Party SaaS Services is indicated in the Investment Summary. Pricing for subsequent years will be at the respective third party’s then-current rates.
4. Transaction Fees. Unless paid directly by an end user at the time of transaction, per transaction (call, message, etc.) fees are invoiced on a quarterly basis. Fees are indicated in Exhibit A and may be increased by Tyler upon notice of no less than thirty (30) days.

5. Expenses. The service rates in the Investment Summary do not include travel expenses. Expenses for Tyler delivered services will be billed as incurred and only in accordance with our then-current Business Travel Policy, plus a 10% travel agency processing fee. Our current Business Travel Policy is attached to this Exhibit B as Schedule 1. Copies of receipts will be provided upon request; we reserve the right to charge you an administrative fee depending on the extent of your requests. Receipts for miscellaneous items less than twenty-five dollars and mileage logs are not available.
6. Credit for Prepaid Maintenance and Support Fees for Migration Modules. Client will receive a credit for the maintenance and support fees prepaid for the Migration Modules for the time period commencing on the first day of the initial term, as set forth in Section F (1) of this Agreement. Migration Modules are listed at Exhibit A, Schedule 1.

Payment. Payment for undisputed invoices is due within forty-five (45) days of the invoice date. We prefer to receive payments electronically. Our electronic payment information is available by contacting AR@tylertech.com.



**Exhibit B
Schedule 1
Business Travel Policy**

1. Air Travel

A. Reservations & Tickets

The Travel Management Company (TMC) used by Tyler will provide an employee with a direct flight within two hours before or after the requested departure time, assuming that flight does not add more than three hours to the employee's total trip duration and the fare is within \$100 (each way) of the lowest logical fare. If a net savings of \$200 or more (each way) is possible through a connecting flight that is within two hours before or after the requested departure time and that does not add more than three hours to the employee's total trip duration, the connecting flight should be accepted.

Employees are encouraged to make advanced reservations to take full advantage of discount opportunities. Employees should use all reasonable efforts to make travel arrangements at least two (2) weeks in advance of commitments. A seven (7) day advance booking requirement is mandatory. When booking less than seven (7) days in advance, management approval will be required.

Except in the case of international travel where a segment of continuous air travel is six (6) or more consecutive hours in length, only economy or coach class seating is reimbursable. Employees shall not be reimbursed for "Basic Economy Fares" because these fares are non-refundable and have many restrictions that outweigh the cost-savings.

B. Baggage Fees

Reimbursement of personal baggage charges are based on trip duration as follows:

- Up to five (5) days = one (1) checked bag
- Six (6) or more days = two (2) checked bags

Baggage fees for sports equipment are not reimbursable.



2. Ground Transportation

A. Private Automobile

Mileage Allowance – Business use of an employee's private automobile will be reimbursed at the current IRS allowable rate, plus out of pocket costs for tolls and parking. Mileage will be calculated by using the employee's office as the starting and ending point, in compliance with IRS regulations. Employees who have been designated a home office should calculate miles from their home.

B. Rental Car

Employees are authorized to rent cars only in conjunction with air travel when cost, convenience, and the specific situation reasonably require their use. When renting a car for Tyler business, employees should select a "mid-size" or "intermediate" car. "Full" size cars may be rented when three or more employees are traveling together. Tyler carries leased vehicle coverage for business car rentals; except for employees traveling to Alaska and internationally (excluding Canada), additional insurance on the rental agreement should be declined.

C. Public Transportation

Taxi or airport limousine services may be considered when traveling in and around cities or to and from airports when less expensive means of transportation are unavailable or impractical. The actual fare plus a reasonable tip (15-18%) are reimbursable. In the case of a free hotel shuttle to the airport, tips are included in the per diem rates and will not be reimbursed separately.

D. Parking & Tolls

When parking at the airport, employees must use longer term parking areas that are measured in days as opposed to hours. Park and fly options located near some airports may also be used. For extended trips that would result in excessive parking charges, public transportation to/from the airport should be considered. Tolls will be reimbursed when receipts are presented.

3. Lodging

Tyler's TMC will select hotel chains that are well established, reasonable in price, and conveniently located in relation to the traveler's work assignment. Typical hotel chains include Courtyard, Fairfield Inn, Hampton Inn, and Holiday Inn Express. If the employee has a discount rate with a local hotel, the hotel reservation should note that discount and the employee should confirm the lower rate with the hotel upon arrival. Employee memberships in travel clubs such as AAA should be noted in their travel profiles so that the employee can take advantage of any lower club rates.

"No shows" or cancellation fees are not reimbursable if the employee does not comply with the hotel's cancellation policy.

Tips for maids and other hotel staff are included in the per diem rate and are not reimbursed separately.

Employees are not authorized to reserve non-traditional short-term lodging, such as Airbnb, VRBO, and HomeAway. Employees who elect to make such reservations shall not be reimbursed.

4. Meals and Incidental Expenses

Employee meals and incidental expenses while on travel status within the continental U.S. are in accordance with the federal per diem rates published by the General Services Administration. Incidental expenses include tips to maids, hotel staff, and shuttle drivers and other minor travel expenses. Per diem rates are available at www.gsa.gov/perdiem.

Per diem for Alaska, Hawaii, U.S. protectorates and international destinations are provided separately by the Department of State and will be determined as required.

A. Overnight Travel

For each full day of travel, all three meals are reimbursable. Per diems on the first and last day of a trip are governed as set forth below.

Departure Day

Depart before 12:00 noon	Lunch and dinner
Depart after 12:00 noon	Dinner

Return Day

Return before 12:00 noon	Breakfast
Return between 12:00 noon & 7:00 p.m.	Breakfast and lunch
Return after 7:00 p.m.*	Breakfast, lunch and dinner

*7:00 p.m. is defined as direct travel time and does not include time taken to stop for dinner.

The reimbursement rates for individual meals are calculated as a percentage of the full day per diem as follows:

Breakfast	15%
Lunch	25%
Dinner	60%

B. Same Day Travel

Employees traveling at least 100 miles to a site and returning in the same day are eligible to claim lunch on an expense report. Employees on same day travel status are eligible to claim dinner in the event they return home after 7:00 p.m.*

*7:00 p.m. is defined as direct travel time and does not include time taken to stop for dinner.

5. Internet Access – Hotels and Airports

Employees who travel may need to access their e-mail at night. Many hotels provide free high speed internet access and Tyler employees are encouraged to use such hotels whenever possible. If an employee's hotel charges for internet access it is reimbursable up to \$10.00 per day. Charges for internet access at airports are not reimbursable.

6. International Travel

All international flights with the exception of flights between the U.S. and Canada should be reserved through TMC using the "lowest practical coach fare" with the exception of flights that are six (6) or more consecutive hours in length. In such event, the next available seating class above coach shall be reimbursed.

When required to travel internationally for business, employees shall be reimbursed for photo fees, application fees, and execution fees when obtaining a new passport book, but fees related to passport renewals are not reimbursable. Visa application and legal fees, entry taxes and departure taxes are reimbursable.

The cost of vaccinations that are either required for travel to specific countries or suggested by the U.S. Department of Health & Human Services for travel to specific countries, is reimbursable.

Section 4, Meals & Incidental Expenses, and Section 2.b., Rental Car, shall apply to this section.



Exhibit C

SERVICE LEVEL AGREEMENT

I. Agreement Overview

This SLA operates in conjunction with, and does not supersede or replace any part of, the Agreement. It outlines the information technology service levels that we will provide to you to ensure the availability of the application services that you have requested us to provide. All other support services are documented in the Support Call Process. This SLA does not apply to any Third Party SaaS Services. All other support services are documented in the Support Call Process.

II. Definitions. Except as defined below, all defined terms have the meaning set forth in the Agreement.

Actual Attainment: The percentage of time the Tyler Software is available during a calendar month, calculated as follows: $(\text{Service Availability} - \text{Downtime}) \div \text{Service Availability}$.

Client Error Incident: Any service unavailability resulting from your applications, content or equipment, or the acts or omissions of any of your service users or third-party providers over whom we exercise no control.

Downtime: Those minutes during Service Availability, as defined below, when all users cannot launch, login, search or save primary data in the Tyler Software. Downtime does not include those instances in which only a Defect is present.

Emergency Maintenance Window: (1) maintenance that is required to patch a critical security vulnerability; (2) maintenance that is required to prevent an imminent outage of Service Availability; or (3) maintenance that is mutually agreed upon in writing by Tyler and the Client.

Planned Downtime: Downtime that occurs during a Standard or Emergency Maintenance window.

Service Availability: The total number of minutes in a calendar month that the Tyler Software is capable of receiving, processing, and responding to requests, excluding Planned Downtime, Client Error Incidents, denial of service attacks and Force Majeure. Service Availability only applies to Tyler Software being used in the live production environment.

Standard Maintenance: Routine maintenance to the Tyler Software and infrastructure. Standard Maintenance is limited to five (5) hours per week.

III. **Service Availability**

a. Your Responsibilities

Whenever you experience Downtime, you must make a support call according to the procedures outlined in the Support Call Process. You will receive a support case number.



b. Our Responsibilities

When our support team receives a call from you that Downtime has occurred or is occurring, we will work with you to identify the cause of the Downtime (including whether it may be the result of Planned Downtime, a Client Error Incident, denial of service attack or Force Majeure). We will also work with you to resume normal operations.

c. Client Relief

Our targeted Attainment Goal is 100%. You may be entitled to credits as indicated in the Client Relief Schedule found below. Your relief credit is calculated as a percentage of the SaaS Fees paid for the calendar month.

In order to receive relief credits, you must submit a request through one of the channels listed in our Support Call Process within fifteen days (15) of the end of the applicable month. We will respond to your relief request within thirty (30) day(s) of receipt.

The total credits confirmed by us will be applied to the SaaS Fee for the next billing cycle. Issuing of such credit does not relieve us of our obligations under the Agreement to correct the problem which created the service interruption.

Credits are only payable when Actual Attainment results in eligibility for credits in consecutive months and only for such consecutive months.

Client Relief Schedule	
Actual Attainment	Client Relief
99.99% - 99.70%	Remedial action will be taken
99.69% - 98.50%	2% of SaaS Fees paid for applicable month
98.49% - 97.50%	4% of SaaS Fees paid for applicable month
97.49% - 96.50%	6% of SaaS Fees paid for applicable month
96.49% - 95.50%	8% of SaaS Fees paid for applicable month
Below 95.50%	10% of SaaS Fees paid for applicable month

* Notwithstanding language in the Agreement to the contrary, Recovery Point Objective is one (1) hour.

IV. Maintenance Notifications

We perform Standard Maintenance during limited windows that are historically known to be reliably low-traffic times. If and when maintenance is predicted to occur during periods of higher traffic, we will provide advance notice of those windows and will coordinate to the greatest extent possible with you.



Not all maintenance activities will cause application unavailability. However, if Tyler anticipates that activities during a Standard or Emergency Maintenance window may make the Tyler Software unavailable, we will provide advance notice, as reasonably practicable, that the Tyler Software will be unavailable during the maintenance window.



Exhibit C Schedule 1 Support Call Process

Support Channels

Tyler Technologies, Inc. provides the following channels of software support for authorized users*:

- (1) On-line submission (portal) – for less urgent and functionality-based questions, users may create support incidents through the Tyler Customer Portal available at the Tyler Technologies website. A built-in Answer Panel provides users with resolutions to most “how-to” and configuration-based questions through a simplified search interface with machine learning, potentially eliminating the need to submit the support case.
- (2) Email – for less urgent situations, users may submit emails directly to the software support group.
- (3) Telephone – for urgent or complex questions, users receive toll-free, telephone software support.

** Channel availability may be limited for certain applications.*

Support Resources

A number of additional resources are available to provide a comprehensive and complete support experience:

- (1) Tyler Website – www.tylertech.com – for accessing client tools, documentation, and other information including support contact information.
- (2) Tyler Search -a knowledge based search engine that lets you search multiple sources simultaneously to find the answers you need, 24x7.
- (3) Tyler Community –provides a venue for all Tyler clients with current maintenance agreements to collaborate with one another, share best practices and resources, and access documentation.
- (4) Tyler University – online training courses on Tyler products.

Support Availability

Tyler Technologies support is available during the local business hours of 8 AM to 5 PM (Monday – Friday) across four US time zones (Pacific, Mountain, Central and Eastern). Tyler’s holiday schedule is outlined below. There will be no support coverage on these days.

New Year’s Day	Labor Day
Martin Luther King, Jr. Day	Thanksgiving Day
Memorial Day	Day after Thanksgiving
Independence Day	Christmas Day

For support teams that provide after-hours service, we will provide you with procedures for contacting



support staff after normal business hours for reporting Priority Level 1 Defects only. Upon receipt of such a Defect notification, we will use commercially reasonable efforts to meet the resolution targets set forth below.

We will also make commercially reasonable efforts to be available for one pre-scheduled Saturday of each month to assist your IT staff with applying patches and release upgrades, as well as consulting with them on server maintenance and configuration of the Tyler Software environment.

Incident Handling

Incident Tracking

Every support incident is logged into Tyler’s Customer Relationship Management System and given a unique case number. This system tracks the history of each incident. The case number is used to track and reference open issues when clients contact support. Clients may track incidents, using the case number, through Tyler’s Customer Portal or by calling software support directly.

Incident Priority

Each incident is assigned a priority level, which corresponds to the Client’s needs. Tyler and the Client will reasonably set the priority of the incident per the chart below. This chart is not intended to address every type of support incident, and certain “characteristics” may or may not apply depending on whether the Tyler software has been deployed on customer infrastructure or the Tyler cloud. The goal is to help guide the Client towards clearly understanding and communicating the importance of the issue and to describe generally expected response and resolution targets in the production environment only.

References to a “confirmed support incident” mean that Tyler and the Client have successfully validated the reported Defect/support incident.

Priority Level	Characteristics of Support Incident	Resolution Targets*
1 Critical	Support incident that causes (a) complete application failure or application unavailability; (b) application failure or unavailability in one or more of the client’s remote location; or (c) systemic loss of multiple essential system functions.	Tyler shall provide an initial response to Priority Level 1 incidents within one (1) business hour of receipt of the incident. Once the incident has been confirmed, Tyler shall use commercially reasonable efforts to resolve such support incidents or provide a circumvention procedure within one (1) business day. For non-hosted customers, Tyler’s responsibility for lost or corrupted data is limited to assisting the Client in restoring its last available database.

Priority Level	Characteristics of Support Incident	Resolution Targets*
2 High	Support incident that causes (a) repeated, consistent failure of essential functionality affecting more than one user or (b) loss or corruption of data.	Tyler shall provide an initial response to Priority Level 2 incidents within four (4) business hours of receipt of the incident. Once the incident has been confirmed, Tyler shall use commercially reasonable efforts to resolve such support incidents or provide a circumvention procedure within ten (10) business days. For non-hosted customers, Tyler's responsibility for loss or corrupted data is limited to assisting the Client in restoring its last available database.
3 Medium	Priority Level 1 incident with an existing circumvention procedure, or a Priority Level 2 incident that affects only one user or for which there is an existing circumvention procedure.	Tyler shall provide an initial response to Priority Level 3 incidents within one (1) business day of receipt of the incident. Once the incident has been confirmed, Tyler shall use commercially reasonable efforts to resolve such support incidents without the need for a circumvention procedure with the next published maintenance update or service pack, which shall occur at least quarterly. For non-hosted customers, Tyler's responsibility for lost or corrupted data is limited to assisting the Client in restoring its last available database.
4 Non-critical	Support incident that causes failure of non-essential functionality or a cosmetic or other issue that does not qualify as any other Priority Level.	Tyler shall provide an initial response to Priority Level 4 incidents within two (2) business days of receipt of the incident. Once the incident has been confirmed, Tyler shall use commercially reasonable efforts to resolve such support incidents, as well as cosmetic issues, with a future version release.

**Response and Resolution Targets may differ by product or business need*

Incident Escalation

If Tyler is unable to resolve any priority level 1 or 2 defect as listed above or the priority of an issue has elevated since initiation, you may escalate the incident to the appropriate resource, as outlined by each product support team. The corresponding resource will meet with you and any Tyler staff to establish a mutually agreeable plan for addressing the defect.

Remote Support Tool

Some support calls may require further analysis of the Client's database, processes or setup to diagnose a problem or to assist with a question. Tyler will, at its discretion, use an industry-standard remote support tool. Tyler's support team must have the ability to quickly connect to the Client's system and view the site's setup, diagnose problems, or assist with screen navigation. More information about the remote support tool Tyler uses is available upon request.





Exhibit D Third Party Terms

DocOrigin Terms. Your use of Tyler Forms software and forms is subject to the DocOrigin End User License Agreement available for download here: <https://eclipsecorp.us/eula/>. By signing a Tyler Agreement or Order Form including Tyler forms software or forms, or accessing, installing, or using Tyler Forms software or forms, you agree that you have read, understood, and agree to such terms.

Pattern Stream Terms. Your use of Pattern Stream software and services is subject to the terms found here: <https://www.tylertech.com/terms/finite-matters-ltd-consolidated-terms>. By signing a Tyler Agreement or Order Form, or accessing, installing, or using Pattern Stream software or services, you agree that you have read, understood, and agree to such terms.

ThinPrint Terms. Your use of Tyler Forms software and forms is subject to the End User License Agreement terms for ThinPrint Engine, ThinPrint License Server, and Connected Gateway found here: <https://www.thinprint.com/en/legal-notes/eula/>. By signing a Tyler Agreement or Order Form, or accessing, installing, or using Tyler Forms software or forms, you agree that you have read, understood, and agree to such terms.

Twilio Acceptable Use Policy. Your use of the Tyler solutions listed below includes functionality provided by a Third Party Developer, Twilio. Your rights, and the rights of any of your end users, to use said functionality are subject to the terms of the Twilio Acceptable Use Policy, available at <http://www.twilio.com/legal/aup>. By signing a Tyler Agreement or Order Form, or accessing, installing, or using any such Tyler solution, you certify that you have reviewed, understand and agree to said terms. Tyler hereby disclaims any and all liability related to your or your end user's failure to abide by the terms of the Twilio Acceptable Use Policy. Any liability for failure to abide by said terms shall rest solely with the person or entity whose conduct violated said terms.

- Electronic Warrants
- Online Dispute Resolution
- Enterprise Justice Notifications Add On (text notifications)
- Absence & Substitute
- Notify
- Enterprise Jury Manager
- Enterprise Supervision
- Virtual Court





Exhibit E
Statement of Work

Statement of Work to be inserted prior to Agreement execution.



Bonney Lake, WA

SOW from Tyler Technologies, Inc.

4/9/2024

Presented to:
City of Bonney Lake WA
PO Box 7380
Bonney Lake, WA 98391-0944

Contact:
Rich Boven
Email: richard.boven@tylertech.com
1 Tyler Drive, Yarmouth, Maine 04096

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Part 1: Executive Summary

1. Project Overview

1.1 Introduction

Tyler Technologies (“Tyler”) is the largest and most established provider of integrated software and technology services focused solely on the public sector. Tyler’s end-to-end solutions empower public sector entities including local, state, provincial and federal government, to operate more efficiently and connect more transparently with their constituents and with each other. By connecting data and processes across disparate systems, Tyler’s solutions transform how clients gain actionable insights that solve problems in their communities.

1.2 Project Goals

This Statement of Work (“SOW”) documents the methodology, implementation stages, activities, and roles and responsibilities, and project scope listed in the Investment Summary of the Agreement between Tyler and the City (collectively the “Project”).

The overall goals of the project are to:

- Successfully implement the contracted scope on time and on budget
- Increase operational efficiencies and empower users to be more productive
- Improve accessibility and responsiveness to external and internal customer needs
- Overcome current challenges and meet future goals

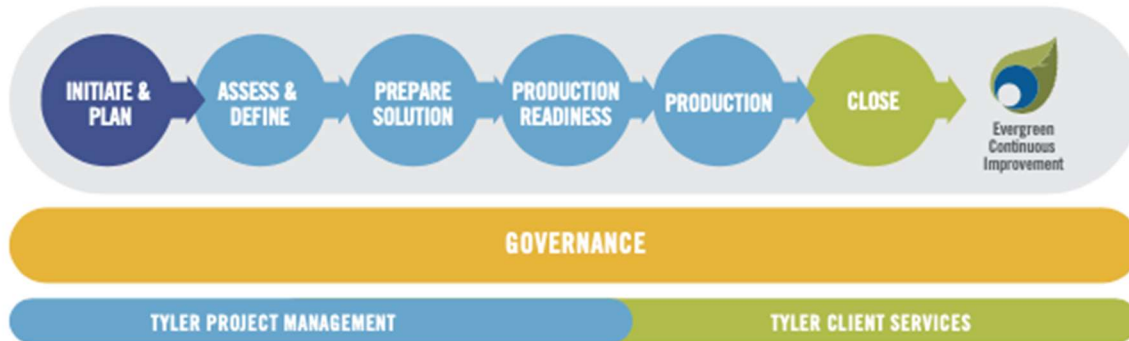
1.3 Methodology

This is accomplished by the City and Tyler working as a partnership and Tyler utilizing its depth of implementation experience. While each Project is unique, all will follow Tyler’s six-stage methodology. Each of the six stages is comprised of multiple work packages, and each work package includes a narrative description, objectives, tasks, inputs, outputs/deliverables, assumptions, and a responsibility matrix.

Tailored specifically for Tyler’s public sector clients, the project methodology contains Stage Acceptance Control Points throughout each Phase to ensure adherence to scope, budget, timeline controls, effective communications, and quality standards. Clearly defined, the project methodology repeats consistently across Phases, and is scaled to meet the City’s complexity and organizational needs.



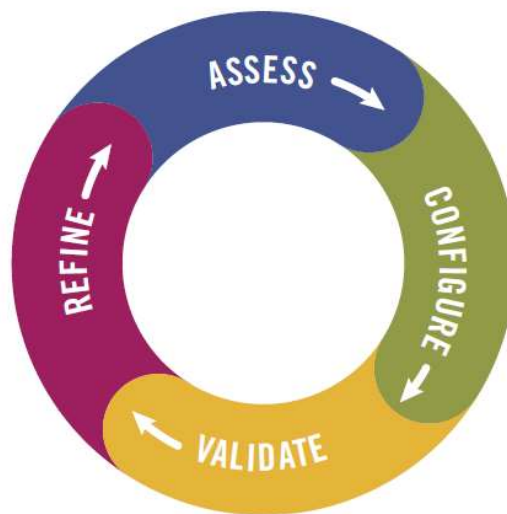
Tyler's Six Stage Project Methodology



The methodology adapts to both single-phase and multiple-phase projects.

To achieve Project success, it is imperative that both the City and Tyler commit to including the necessary leadership and governance. During each stage of the Project, it is expected that the City and Tyler Project teams work collaboratively to complete tasks. An underlying principle of Tyler's Implementation process is to employ an iterative model where the City's business processes are assessed, configured, validated, and refined cyclically in line with the project budget. This approach is used in multiple stages and work packages as illustrated in the graphic below.

Iterative Project Model



The delivery approach is systematic, which reduces variability and mitigates risks to ensure Project success. As illustrated, some stages, along with work packages and tasks, are intended to be overlapping by nature to complete the Project efficiently and effectively.



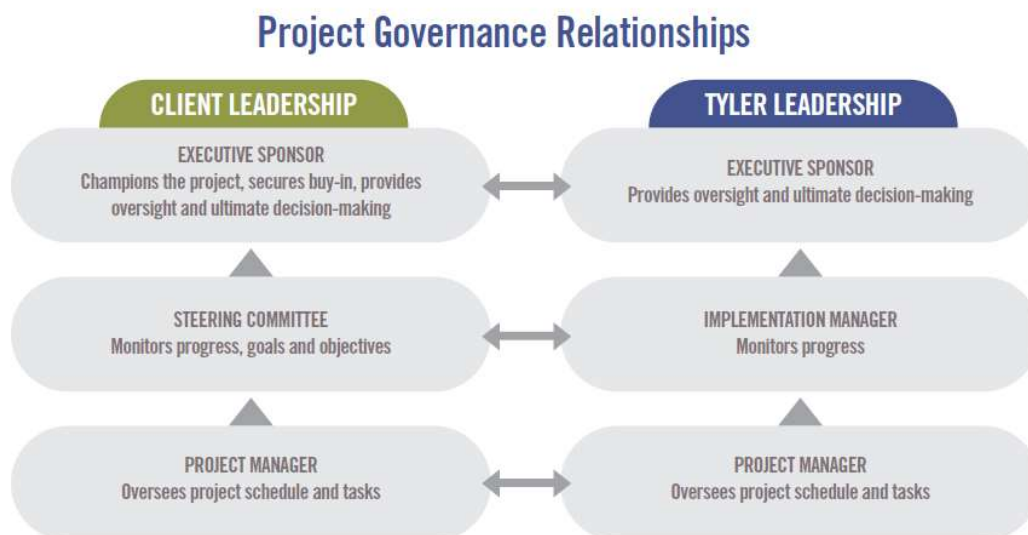
Part 2: Project Foundation

2. Project Governance

Project governance is the management framework within which Project decisions are made. The role of Project governance is to provide a decision-making approach that is logical, robust, and repeatable. This allows organizations to have a structured approach for conducting its daily business in addition to project related activities.

This section outlines the resources required to meet the business needs, objectives, and priorities for the Project, communicate the goals to other Project participants, and provide support and guidance to accomplish these goals. Project governance defines the structure for escalation of issues and risks, Change Control review and authority, and Organizational Change Management activities. Throughout the Statement of Work Tyler has provided RACI Matrices for activities to be completed throughout the implementation which will further outline responsibilities of different roles in each stage. Further refinement of the governance structure, related processes, and specific roles and responsibilities occurs during the Initiate & Plan Stage.

The chart below illustrates an overall team perspective where Tyler and the City collaborate to resolve Project challenges according to defined escalation paths. If project managers do not possess authority to determine a solution, resolve an issue, or mitigate a risk, Tyler implementation management and the City Steering Committee become the escalation points to triage responses prior to escalation to the City and Tyler executive sponsors. As part of the escalation process, each Project governance tier presents recommendations and supporting information to facilitate knowledge transfer and issue resolution. The City and Tyler executive sponsors serve as the final escalation point.



3. Project Scope Control

3.1 Managing Scope and Project Change

Project Management governance principles contend that there are three connected constraints on a Project: budget, timeline, and scope. These constraints, known as the “triple constraints” or project management triangle, define budget in terms of financial cost, labor costs, and other resource costs. Scope is defined as the work performed to deliver a product, service or result with the specified features and functions, while time is simply defined as the schedule. The Triple Constraint theory states that if you change one side of the triangle, the other two sides must be correspondingly adjusted. For example, if the scope of the Project is increased, cost and time to complete will also need to increase. The Project and executive teams will need to remain cognizant of these constraints when making impactful decisions to the Project. A simple illustration of this triangle is included here, showing the connection of each item and their relational impact to the overall Scope.



A pillar of any successful project is the ability to properly manage scope while allowing the appropriate level of flexibility to incorporate approved changes. Scope and changes within the project will be managed using the change control process outlined in the following section.

3.2 Change Control

It may become necessary to change the scope of this Project due to unforeseeable circumstances (e.g., new constraints or opportunities are discovered). This Project is being undertaken with the understanding that Project scope, schedule, and/or cost may need to change to produce optimal results for stakeholders. Changes to contractual requirements will follow the change control process specified in the final contract, and as described below.

3.3 Change Request Management

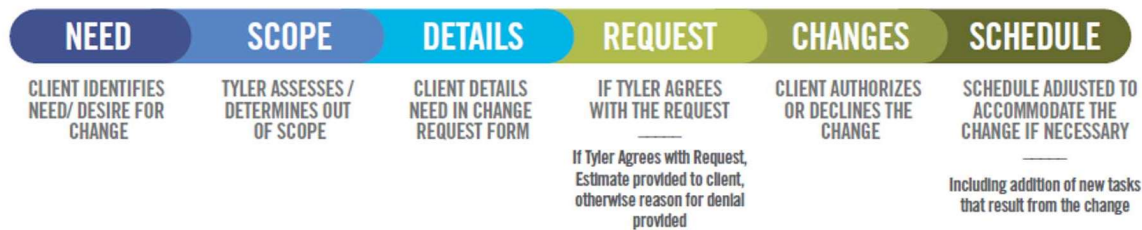
Should the need for a change to Project scope, schedule, and/or cost be identified during the Project, the change will be brought to the attention of the Steering Committee and an assessment of the change will occur. While such changes may result in additional costs and delays relative to the schedule, some changes may result in less cost to the City; for example, the City may decide it no longer needs a deliverable originally defined in the Project. The Change Request will include the following information:



- The nature of the change.
- A good faith estimate of the additional cost or associated savings to the City, if any.
- The timetable for implementing the change.
- The effect on and/or risk to the schedule, resource needs or resource responsibilities.

The City will use its good faith efforts to either approve or disapprove any Change Request within ten (10) Business Days (or other period as mutually agreeable between Tyler and the City). Any changes to the Project scope, budget, or timeline must be documented and approved in writing using a Change Request form. These changes constitute a formal amendment to the Statement of Work and will supersede any conflicting term in the Statement of Work.

Change Request Process



4. Acceptance Process

The implementation of a Project involves many decisions to be made throughout its lifecycle. Decisions will vary from higher level strategy decisions to smaller, detailed Project level decisions. It is critical to the success of the Project that each City office or department designates specific individuals for making decisions on behalf of their offices or departments.

Both Tyler and the City will identify representative project managers. These individuals will represent the interests of all stakeholders and serve as the primary contacts between the two organizations.

The coordination of gaining City feedback and approval on Project deliverables will be critical to the success of the Project. The City project manager will strive to gain deliverable and decision approvals from all authorized City representatives. Given that the designated decision-maker for each department may not always be available, there must be a designated proxy for each decision point in the Project. Assignment of each proxy will be the responsibility of the leadership from each City department. The proxies will be named individuals that have the authorization to make decisions on behalf of their department.

The following process will be used for accepting Deliverables and Control Points:

- The City shall have five (5) business days from the date of delivery, or as otherwise mutually agreed upon by the parties in writing, to accept each Deliverable or Control Point. If the City does not provide acceptance or acknowledgement within five (5) business days, or the otherwise agreed upon timeframe, not to be unreasonably withheld, Tyler deems the Deliverable or Control Point as accepted.
- If the City does not agree the Deliverable or Control Point meets requirements, the City shall notify Tyler project manager(s), in writing, with reasoning within five (5) business days, or the otherwise agreed-upon timeframe, not to be unreasonably withheld, of receipt of the Deliverable.
- Tyler shall address any deficiencies and redeliver the Deliverable or Control Point. The City shall then have two (2) business days from receipt of the redelivered Deliverable or Control Point to accept or again submit written notification of reasons for rejecting the milestone. If the City does not provide acceptance within two (2) business days, or the otherwise agreed upon timeframe, not to be unreasonably withheld, Tyler deems the Deliverable or Control Point as accepted.

5. Roles and Responsibilities

The following defines the roles and responsibilities of each Project resource for the City and Tyler. Roles and responsibilities may not follow the organizational chart or position descriptions at the City, but are roles defined within the Project. It is common for individual resources on both the Tyler and City project teams to fill multiple roles. Similarly, it is common for some roles to be filled by multiple people.

5.1 Tyler Roles & Responsibilities

Tyler assigns a project manager prior to the start of each Phase of the Project (some Projects may only be one Phase in duration). Additional Tyler resources are assigned as the schedule develops and as needs arise.



5.1.1 Tyler Executive Manager

Tyler executive management has indirect involvement with the Project and is part of the Tyler escalation process. This team member offers additional support to the Project team and collaborates with other Tyler department managers as needed to escalate and facilitate implementation Project tasks and decisions.

- Provides clear direction for Tyler staff on executing on the Project Deliverables to align with satisfying the City's overall organizational strategy.
- Authorizes required Project resources.
- Resolves all decisions and/or issues not resolved at the implementation management level as part of the escalation process.
- Acts as the counterpart to the City's executive sponsor.

5.1.2 Tyler Implementation Manager

- Tyler implementation management has indirect involvement with the Project and is part of the Tyler escalation process. The Tyler project managers consult implementation management on issues and outstanding decisions critical to the Project. Implementation management works toward a solution with the Tyler Project Manager or with City management as appropriate. Tyler executive management is the escalation point for any issues not resolved at this level.
- Assigns Tyler Project personnel.
- Provides support for the Project team.
- Provides management support for the Project to ensure it is staffed appropriately and staff have necessary resources.
- Monitors Project progress including progress towards agreed upon goals and objectives.

5.1.3 Tyler Project Manager

- The Tyler project manager(s) provides oversight of the Project, coordination of Tyler resources between departments, management of the Project budget and schedule, effective risk, and issue management, and is the primary point of contact for all Project related items. As requested by the City, the Tyler Project Manager provides regular updates to the City Steering Committee and other Tyler governance members. Tyler Project Manager's role includes responsibilities in the following areas:

5.1.3.1 Contract Management

- Validates contract compliance throughout the Project.
- Ensures Deliverables meet contract requirements.
- Acts as primary point of contact for all contract and invoicing questions.
- Prepares and presents contract milestone sign-offs for acceptance by the City project manager(s).
- Coordinates Change Requests, if needed, to ensure proper Scope and budgetary compliance.

5.1.3.2 Planning

- Delivers project planning documents.
- Defines Project tasks and resource requirements.
- Develops initial Project schedule and Project Management Plan.
- Collaborates with the City project manager(s) to plan and schedule Project timelines to achieve on-time implementation.



5.1.3.3 Implementation Management

- Tightly manages Scope and budget of Project to ensure Scope changes and budget planned versus actual are transparent and handled effectively and efficiently.
- Establishes and manages a schedule and Tyler resources that properly support the Project Schedule and are also in balance with Scope/budget.
- Establishes risk/issue tracking/reporting process between the City and Tyler and takes all necessary steps to proactively mitigate these items or communicate with transparency to the City any items that may impact the outcomes of the Project.
- Collaborates with the City's project manager(s) to establish key business drivers and success indicators that will help to govern Project activities and key decisions to ensure a quality outcome of the project.
- Collaborates with the City's project manager(s) to set a routine communication plan that will aide all Project team members, of both the City and Tyler, in understanding the goals, objectives, status, and health of the Project.

5.1.3.4 Resource Management

- Acts as liaison between Project team and Tyler manager(s).
- Identifies and coordinates all Tyler resources across all applications, Phases, and activities including development, forms, installation, reports, implementation, and billing.
- Provides direction and support to Project team.
- Manages the appropriate assignment and timely completion of tasks as defined in the Project Schedule, task list, and Go-Live Checklist.
- Assesses team performance and adjusts as necessary.
- Consulted on in Scope 3rd party providers to align activities with ongoing Project tasks.

5.1.4 Tyler Implementation Consultant

- Completes tasks as assigned by the Tyler project manager(s).
- Documents activities for services performed by Tyler.
- Guides the City through software validation process following configuration.
- Assists during Go-Live process and provides support until the City transitions to Client Services.
- Facilitates training sessions and discussions with the City and Tyler staff to ensure adequate discussion of the appropriate agenda topics during the allotted time.
- May provide conversion review and error resolution assistance.

5.1.5 Tyler Sales

- Supports Sales to Implementation knowledge transfer during Initiate & Plan.
- Provides historical information, as needed, throughout implementation.
- Participates in pricing activities if additional licensing and/or services are needed.

5.1.6 Tyler Technical Services

- Maintains Tyler infrastructure requirements and design document(s).
- Involved in system infrastructure planning/review(s).
- Provides first installation of licensed software with initial database on servers.
- Supports and assists the project team with technical/environmental issues/needs.
- Deploys Tyler products.



- Conducts GIS Planning.
- Reviews GIS data and provides feedback to the City.
- Loads City provided GIS data into the system.

5.2 City Roles & Responsibilities

City resources will be assigned prior to the start of each Phase of the Project. One person may be assigned to multiple Project roles.

5.2.1 City Executive Sponsor

The City executive sponsor provides support to the Project by providing strategic direction and communicating key issues about the Project and its overall importance to the organization. When called upon, the executive sponsor also acts as the final authority on all escalated Project issues. The executive sponsor engages in the Project, as needed, to provide necessary support, oversight, guidance, and escalation, but does not participate in day-to-day Project activities. The executive sponsor empowers the City steering committee, project manager(s), and functional leads to make critical business decisions for the City.

- Champions the project at the executive level to secure buy-in.
- Authorizes required project resources.
- Actively participates in organizational change communications.

5.2.2 City Steering Committee

The City steering committee understands and supports the cultural change necessary for the Project and fosters an appreciation for the Project's value throughout the organization. The steering committee oversees the City project manager and Project through participation in regular internal meetings. The City steering committee remains updated on all Project progress, Project decisions, and achievement of Project milestones. The City steering committee also serves as primary level of issue resolution for the Project.

- Works to resolve all decisions and/or issues not resolved at the project manager level as part of the escalation process.
- Attends all scheduled steering committee meetings.
- Provides support for the project team.
- Assists with communicating key project messages throughout the organization.
- Prioritizes the project within the organization.
- Ensures the project staffed appropriately and that staff have necessary resources.
- Monitors project progress including progress towards agreed upon goals and objectives.
- Has the authority to approve or deny changes impacting the following areas:
 - Cost
 - Scope
 - Schedule
 - Project Goals
 - City Policies
 - Needs of other client projects

5.2.3 City Project Manager

The City shall assign project manager(s) prior to the start of this project with overall responsibility and authority to make decisions related to Project Scope, scheduling, and task assignment. The City Project



Manager should communicate decisions and commitments to the Tyler project manager(s) in a timely and efficient manner. When the City project manager(s) do not have the knowledge or authority to make decisions, he or she engages the necessary resources to participate in discussions and make decisions in a timely fashion to avoid Project delays. The City project manager(s) are responsible for reporting to the City steering committee and determining appropriate escalation points.

5.2.3.1 Contract Management

- Validates contract compliance throughout the project.
- Ensures that invoicing and Deliverables meet contract requirements.
- Acts as primary point of contact for all contract and invoicing questions. Collaborates on and approves Change Requests, if needed, to ensure proper scope and budgetary compliance.

5.2.3.2 Planning

- Reviews and accepts project planning documents.
- Defines project tasks and resource requirements for the City project team.
- Collaborates in the development and approval of the project schedule.
- Collaborates with Tyler project manager(s) to plan and schedule project timelines to achieve on-time implementation.

5.2.3.3 Implementation Management

- Tightly manages project budget and scope.
- Collaborates with Tyler project manager(s) to establish a process and approval matrix to ensure that scope changes and budget (planned versus actual) are transparent and handled effectively and efficiently.
- Collaborates with Tyler project manager to establish and manage a schedule and resource plan that properly supports the project schedule as a whole and is also in balance with scope and budget.
- Collaborates with Tyler project manager(s) to establish risk and issue tracking and reporting process between the City and Tyler and takes all necessary steps to proactively mitigate these items or communicate with transparency to Tyler any items that may impact the outcomes of the project.
- Collaborates with Tyler project manager(s) to establish key business drivers and success indicators that will help to govern project activities and key decisions to ensure a quality outcome of the project.
- Routinely communicates with both the City staff and Tyler, aiding in the understanding of goals, objectives, current status, and health of the project by all team members.
- Manages the requirements gathering process and ensure timely and quality business requirements are being provided to Tyler.

5.2.3.4 Resource Management

- Acts as liaison between project team and stakeholders.
- Identifies and coordinates all City resources across all modules, phases, and activities including data conversions, forms design, hardware and software installation, reports building, and satisfying invoices.
- Provides direction and support to project team.
- Builds partnerships among the various stakeholders, negotiating authority to move the project forward.
- Manages the appropriate assignment and timely completion of tasks as defined.
- Assesses team performance and takes corrective action, if needed.



- Provides guidance to City technical teams to ensure appropriate response and collaboration with Tyler Technical Support Teams to ensure timely response and appropriate resolution.
- Owns the relationship with in-Scope 3rd party providers and aligns activities with ongoing project tasks.
- Ensures that users have appropriate access to Tyler project toolsets as required.
- Conducts training on proper use of toolsets.
- Validates completion of required assignments using toolsets.

5.2.4 City Functional Leads

- Makes business process change decisions under time sensitive conditions.
- Communicates existing business processes and procedures to Tyler consultants.
- Assists in identifying business process changes that may require escalation.
- Contributes business process expertise for Current & Future State Analysis.
- Identifies and includes additional subject matter experts to participate in Current & Future State Analysis.
- Validates that necessary skills have been retained by end users.
- Provides End Users with dedicated time to complete required homework tasks.
- Acts as an ambassador/champion of change for the new process and provide business process change support.
- Identifies and communicates any additional training needs or scheduling conflicts to the City project manager.
- Actively participates in all aspects of the implementation, including, but not limited to, the following key activities:
 - Task completion
 - Stakeholder Meeting
 - Project Management Plan development
 - Schedule development
 - Maintenance and monitoring of risk register
 - Escalation of issues
 - Communication with Tyler project team
 - Coordination of City resources
 - Attendance at scheduled sessions
 - Change management activities
 - Modification specification, demonstrations, testing and approval assistance
 - Data analysis assistance
 - Decentralized end user training
 - Process testing
 - Solution Validation

5.2.5 City Power Users

- Participate in project activities as required by the project team and project manager(s).
- Provide subject matter expertise on the City business processes and requirements.
- Act as subject matter experts and attend Current & Future State Analysis sessions as needed.
- Attend all scheduled training sessions.
- Participate in all required post-training processes as needed throughout project.
- Test all application configuration to ensure it satisfies business process requirements.
- Become application experts.
- Participate in Solution Validation.



- Adopt and support changed procedures.
- Complete all deliverables by the due dates defined in the project schedule.
- Demonstrate competency with Tyler products processing prior to Go-live.
- Provide knowledge transfer to the City staff during and after implementation.
- Participate in conversion review and validation.

5.2.6 City End Users

- Attend all scheduled training sessions.
- Become proficient in application functions related to job duties.
- Adopt and utilize changed procedures.
- Complete all deliverables by the due dates defined in the project schedule.
- Utilize software to perform job functions at and beyond Go-live.

5.2.7 City Technical Lead

- Coordinates updates and releases with Tyler as needed.
- Coordinates the copying of source databases to training/testing databases as needed for training days.
- Coordinates and adds new users, printers and other peripherals as needed.
- Validates that all users understand log-on process and have necessary permission for all training sessions.
- Coordinates interface development for City third party interfaces.
- Develops or assists in creating reports as needed.
- Ensures on-site system meets specifications provided by Tyler.
- Assists with software installation as needed.
- Extracts and transmits conversion data and control reports from the City's legacy system per the conversion schedule set forth in the project schedule.

5.2.7.1 City GIS

- Participates in GIS planning activities.
- Responsible for management and maintenance of City GIS infrastructure and data.
- Ensures GIS data/service endpoints are in alignment with Tyler software requirements.
- Provides Tyler implementation team with GIS data/service access information.

5.2.7.2 City Upgrade Coordination

- Becomes familiar with the software upgrade process and required steps.
- Becomes familiar with Tyler's releases and updates.
- Utilizes Tyler resources to stay abreast of the latest Tyler releases and updates, as well as the latest helpful tools to manage the City's software upgrade process.
- Assists with the software upgrade process during implementation.
- Manages software upgrade activities post-implementation.
- Manages software upgrade plan activities.
- Coordinates software upgrade plan activities with City and Tyler resources.
- Communicates changes affecting users and department stakeholders.
- Obtains department stakeholder acceptance to upgrade production environment.



5.2.8 City Change Management Lead

- Validates that users receive timely and thorough communication regarding process changes.
- Provides coaching to supervisors to prepare them to support users through the project changes.
- Identifies the impact areas resulting from project activities and develops a plan to address them proactively.
- Identifies areas of resistance and develops a plan to reinforce the change.
- Monitors post-production performance and new process adherence.



Part 3: Project Plan

6. Project Stages

Work Breakdown Structure

The Work Breakdown Structure (WBS) is a hierarchical representation of a Project or Phase broken down into smaller, more manageable components. The top-level components are called “Stages” and the second level components are called “Work Packages”. The work packages, shown below each stage, contain the high-level work to be done. The detailed Project Schedule, developed during Project/Phase Planning and finalized during subsequent stages, lists the tasks to be completed within each work package. Each stage ends with a “Control Point”, confirming the work performed during that stage of the Project has been accepted by the City.

Work Breakdown Structure (WBS)

1. Initiate & Plan	2. Assess & Define	3. Prepare Solution	4. Production Readiness	5. Production	6. Close
1.1 Initial Coordination	2.1 Solution Orientation	3.1 Initial System Deployment	4.1 Solution Validation	5.1 Go Live	6.1 Phase Close Out
1.2 Project/Phase Planning	2.2 Current & Future State Analysis	3.2 Configuration	4.2 Go Live Readiness	5.2 Transition to Client Services	6.2 Project Close Out
1.3 GIS Planning*	2.3 Modification Analysis	3.3 Process Refinement	4.3 End User Training	5.3 Post Go Live Activities	
1.4 Infrastructure Planning	2.4 Conversion Assessment	3.4 Conversion Delivery			
1.5 Stakeholder Meeting	2.5 Data Assessment	3.5 Data Delivery			
		3.6 Modifications*			

**Items noted with an asterisk in the graphic above relate to specific products and services. If those products and services are not included in the scope of the contract, these specific work packages will be noted as “This work package is not applicable” in Section 6 of the Statement of Work.*



6.1 Initiate and Plan

The Initiate and Plan stage involves Project initiation, infrastructure, and planning. This stage creates a foundation for the Project by identifying and establishing sequence and timing for each Phase as well as verifying scope for the Project. This stage will be conducted at the onset of the Project, with a few unique items being repeated for the additional Phases as needed.

6.1.1 Initial Coordination

Prior to Project commencement, Tyler management assigns project manager(s). Additional Project resources will be assigned later in the Project as a Project schedule is developed. Tyler provides the City with initial Project documents used to gather names of key personnel, their functional role as it pertains to the Project, as well as any blackout dates to consider for future planning. the City gathers the information requested by the provided deadline ensuring preliminary planning and scheduling can be conducted moving the Project forward in a timely fashion. Internally, the Tyler Project Manager(s) coordinate with sales to ensure transfer of vital information from the sales process prior to scheduling a Project Planning Meeting with the City's team. During this step, Tyler will work with the City to establish the date(s) for the Project and Phase Planning session.

Objectives:

- Formally launch the project.
- Establish project governance.
- Define and communicate governance for Tyler.
- Identify City project team.

STAGE 1	Initial Coordination																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
Tyler project team is assigned	A	R	C	I	I	I	I		I		I						
City project team is assigned									A	I	R	I	I	I			
Provide initial project documents to the City		A	R	C			C		I		I						
Gather preliminary information requested			I						A		R	C		C		C	C
Sales to implementation knowledge transfer		A	R	I	I	I	I				I						
Create Project Portal to store project artifacts and facilitate communication		A	R								I						



Inputs	Contract documents
	Statement of Work

Outputs/Deliverables	Working initial project documents
	Project portal

Work package assumptions:

- Project activities begin after the agreement has been fully executed.

6.1.2 Project/Phase Planning

Project and Phase planning provides an opportunity to review the contract, software, data conversions and services purchased, identify applications to implement in each Phase (if applicable), and discuss implementation timeframes.

During this work package Tyler will work with the City to coordinate and plan a formal Project planning meeting(s). This meeting signifies the start of the Project and should be attended by all City Project team members and the Tyler Project Manager. The meeting provides an opportunity for Tyler to introduce its implementation methodology, terminology, and Project management best practices to the City's Project Team. This will also present an opportunity for project managers and Project sponsors to begin to discuss Project communication, metrics, status reporting and tools to be used to measure Project progress and manage change.

Tyler will work with the City Project Team to prepare and deliver the Project Management Plan as an output of the planning meeting. This plan will continue to evolve and grow as the Project progresses and will describe how the project will be executed, monitored, and controlled.

During project planning, Tyler will introduce the tools that will be used throughout the implementation. Tyler will familiarize the City with these tools during project planning and make them available for review and maintenance as applicable throughout the project. Some examples are Solution validation plan, issue log, and go-live checklist.

STAGE 1	Project/Phase Planning																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
		A	R						I		C	C	I				
	Schedule and conduct planning session(s)																



Develop Project Management Plan		A	R						I		C	C	I				
Develop initial project schedule		A	R	I	I	I	I		I	I	C	C	I	I	C		I

Inputs	Contract documents
	Statement of Work
	Guide to Starting Your Project

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Project Management Plan	Delivery of document
	Project Operational Plan	Delivery of document
	Initial Project Schedule	City provides acceptance of schedule based on resource availability, project budget, and goals.

Work package assumptions:

- City has reviewed and completed the Guide to Starting Your Project document.

6.1.3 Infrastructure Planning

Procuring required hardware and setting it up properly is a critical part of a successful implementation. This task is especially important for Tyler-hosted/SaaS deployment models. Tyler will be responsible for building the environments for a hosted/SaaS deployment, unless otherwise identified in the Agreement. Tyler will install Licensed Software on application server(s) or train the City to install License Software. The City is responsible for the installation and setup of all peripheral devices.

Objectives:

- Ensure the City's infrastructure meets Tyler's application requirements.
- Ensure the City's infrastructure is scheduled to be in place and available for use on time.

STAGE 1	Infrastructure Planning																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts	Department Heads	End Users	Technical Leads
Provide Infrastructure Requirements and Design Document		A	R		C		C				I						I
Initial Infrastructure Meeting		A	R		C		C				C						C



Schedule SaaS Environment Availability		A	R				C				I						
Schedule Installation of All Licensed Software		A	R				C				I						I
Infrastructure Audit		A	R				C				I						C

Inputs	Initial Infrastructure Requirements
--------	-------------------------------------

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Completed Infrastructure Requirements	Delivery of Requirements
	Infrastructure Audit	System Passes Audit Criteria

6.1.4 Stakeholder Meeting

Communication of the Project planning outcomes to the City Project team, executives and other key stakeholders is vital to Project success. The Stakeholder meeting is a strategic activity to inform, engage, gain commitment, and instill confidence in the City team. During the meeting, the goals and objectives of the Project will be reviewed along with detail on Project scope, implementation methodology, roles and responsibilities, Project timeline and schedule, and keys to Project success.

Objectives:

- Formally present and communicate the project activities and timeline.
- Communicate project expectations.

STAGE 1	Stakeholder Meeting																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Create Stakeholder Meeting Presentation	I	A	R	I	I				I	I	C		I				
Review Stakeholder Meeting Presentation		I	C						A		R		C				
Perform Stakeholder Meeting Presentation	I	A	R	I	I				I	I	C	I	I	I	I	I	I

Inputs	Agreement
	SOW



	Project Management Plan	
Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Stakeholder Meeting Presentation	

Work package assumptions:

- None

6.1.5 GIS Preparation

GIS data is a core part of many Tyler applications. Other City offices/products may also use this data and have different GIS requirements. A key focus of this preparation will be the process for developing the GIS data for use with Tyler applications. This can be an iterative process, so it is important to begin preparation early.

Objectives:

- Identify all City GIS data sources and formats.
- Tyler to understand the City's GIS needs and practices.
- Ensure the City's GIS data meets Tyler product requirements.

STAGE 1	GIS Preparation																
	Tyler							City									
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Initial GIS Planning Meeting		A	R				C				C						C
Determine all GIS Data Sources			I				I		A		R						C
Provide Source GIS Data			I				I		A		R						C
Review GIS Data and Provide Feedback		A	R				C				I						C

Inputs	GIS Requirements Document	
Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Production Ready Map Data	Meets Tyler GIS Requirements.

Work package assumptions:



- GIS data provided to Tyler is accurate and complete.
- GIS data provided to Tyler is current.
- City is responsible for maintaining the GIS data.

6.1.6 Control Point 1: Initiate & Plan Stage Acceptance

Acceptance criteria for this stage includes completion of all criteria listed below.

Note: Advancement to the Assess & Define stage is not dependent upon Tyler's receipt of this stage acceptance.

Initiate & Plan Stage Deliverables:

- Project Management Plan
- Initial Project Schedule

Initiate & Plan stage acceptance criteria:

- All stage deliverables accepted based on acceptance criteria previously defined
- Project governance defined
- Project portal made available to the City
- Stakeholder meeting complete
- GIS Data Production Ready
- Completed Infrastructure Requirements and Design Document
- System Passes Infrastructure Audit (as applicable)

6.2 Assess & Define

The Assess & Define stage will provide an opportunity to gather information related to current City business processes. This information will be used to identify and define business processes utilized with Tyler software. The City collaborates with Tyler providing complete and accurate information to Tyler staff and assisting in analysis, understanding current workflows and business processes.

6.2.1 Solution Orientation

The Solution Orientation provides the Project stakeholders a high-level understanding of the solution functionality prior to beginning the current and future state analysis. The primary goal is to establish a foundation for upcoming conversations regarding the design and configuration of the solution.

Tyler utilizes a variety of tools for the Solution Orientation, focusing on City team knowledge transfer such as: eLearning, documentation, or walkthroughs. The City team will gain a better understanding of the major processes and focus on data flow, the connection between configuration options and outcome, integration, and terminology that may be unique to Tyler's solution.

Objectives:

- Provide a basic understanding of system functionality.
- Prepare the City for current and future state analysis.

STAGE 2	Solution Orientation
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	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power)	Department Heads	End Users	Technical Leads
			A	R							I	I		I	I		I
											A	R		C			C
			A	R							I	I		I	I		I

Inputs	Solution orientation materials
	Training Plan

6.2.2 Current & Future State Analysis

The Current & Future State Analysis provides the Project stakeholders and Tyler an understanding of process changes that will be achieved with the new system.

The City and Tyler will evaluate current state processes, options within the new software, pros and cons of each based on current or desired state and make decisions about the future state configuration and processing. This may occur before or within the same timeframe as the configuration work package. The options within the new software will be limited to the scope of this implementation and will make use of standard Tyler functionality.

The City will adopt the existing Tyler solution wherever possible to avoid project schedule and quality risk from over customization of Tyler products. It is the City's responsibility to verify that in-scope requirements are being met throughout the implementation if functional requirements are defined as part of the contract. The following guidelines will be followed when evaluating if a modification to the product is required:

- A reasonable business process change is available.
- Functionality exists which satisfies the requirement.
- Configuration of the application satisfies the requirement.
- An in-scope modification satisfies the requirement.

Requirements that are not met will follow the agreed upon change control process and can have impacts on the project schedule, scope, budget, and resource availability.

STAGE 2	Current & Future State Analysis	
	Tyler	City



RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power Users)	Department Heads	End Users	Technical Leads
Current State process review			A	R	I	I	I				C	C	C	C			C
Discuss future-state options			A	R	C	C	C				C	C	C	C			C
Make future-state decisions (non-COTS)			C	C	C	C	C				A	R	I	C			C
Document anticipated configuration options required to support future state			A	R	C	C	C				I	I	I	I			I

Inputs	City current state documentation
	Solution Orientation completion

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Documentation that describes future-state decisions and configuration options to support future-state decisions.	Delivery of document

Work package assumptions:

- City attendees possess sufficient knowledge and authority to make future state decisions.
- The City is responsible for any documentation of current state business processes.
- The City can effectively communicate current state processes.

6.2.3 Data Assessment

Given the completion of the Current & Future State Analysis, the Data Assessment will provide the implementation team the design for data delivery prior to configuration. The data Assessment will also allow the Tyler and the City teams to identify the data that will be configured within the Tyler System. The team will develop and map out dataset structures to ensure that data is structured in a way that allows maximum utility.

The teams will review any existing data publish and metadata standards for the City's current data program to determine any necessary adjustments or configuration needs. Finally, the implementation team develops data workflows to map data from the source system(s) into the Tyler system, discussing any additional data requirements as needed.

Objectives:



- Communicate a common understanding of the project goals with respect to data.
- Ensure complete and accurate source data is available for review/transfer.
- If source data is a Tyler legacy system, Tyler performs the data mappings. If source data is from a third-party, client is responsible for mapping the data from the source to the Tyler system.
- Document the data conversion/loading approach.

STAGE 2	Data Conversion Assessment																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Extract Data from Source Systems			I		C						A						R
Complete Data Analysis/Mapping		A	R	C	C						I	C		C			I
Review and Scrub Source Data			I	I	I						A	R		C			I
Build/Update Data Conversion Plan			R	C	C						C	I	I	I			I

Inputs	City Source data
	City Source data Documentation (if available)

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Data Conversion Plan built/updated (if applicable)	City Acceptance of Data Conversion Plan, if Applicable
		City acceptance of Solution Design Document

Work package assumptions:

- If the source data is a Tyler system Tyler's Conversion Engineers extract and map the data into the standard Enterprise ERP conversion format. If the source data is from a third-party the client will provide Tyler with the data in a mutually agreed upon format.
- Tyler will work with the City representatives to identify business rules before writing the conversion.
- City subject matter experts and resources most familiar with the current data will be involved in the data conversion planning effort.



6.2.4 Conversion Assessment

Data Conversions are a major effort in any software implementation. Tyler's conversion tools facilitate the predictable, repeatable conversion process that is necessary to support a successful transition to the Tyler system. The first step in this process is to perform an assessment of the existing ("legacy") system(s), to better understand the source data, risks, and options available. Once the data has been analyzed, the plan for data conversion is completed and communicated to the appropriate stakeholders.

Objectives:

- Communicate a common understanding of the project goals with respect to data.
- Ensure complete and accurate source data is available for review/transfer.
- Map the data from the source to the Tyler system.
- Document the data conversion/loading approach.

STAGE 2	Data Conversion Assessment																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power Users)	Department Heads	End Users	Technical Leads
Extract Data from Source Systems			I		C						A						R
Review and Scrub Source Data			I	I	I						A	R		C			I
Build/Update Data Conversion Plan			R	C	C						C	I	I	I			I

Inputs	City Source data
	City Source data Documentation (if available)

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Data Conversion Plan built/updated	City Acceptance of Data Conversion Plan, if Applicable

Work package assumptions:

- Tyler will be provided with data from the Legacy system(s) in a mutually agreed upon format.
- Tyler will work with the City representatives to identify business rules before writing the conversion.
- City subject matter experts and resources most familiar with the current data will be involved in the data conversion planning effort.



6.2.5 This work package is not applicable.

6.2.6 This work package is not applicable.

6.2.7 Control Point 2: Assess & Define Stage Acceptance

Acceptance criteria for this Stage includes completion of all criteria listed below.

Note: Advancement to the Prepare Solution Stage is dependent upon Tyler's receipt of the Stage Acceptance.

Assess & Define Stage Deliverables:

- Documentation of future state decisions and configuration options to support future state decisions.
- Modification specification document.
- Assess & Define Stage Acceptance Criteria:
- All stage deliverables accepted based on criteria previously defined.
- Solution Orientation is delivered.
- Conversion data extracts are received by Tyler.
- Data conversion plan built.

6.3 Prepare Solution

During the Prepare Solution stage, information gathered during the Initiate & Plan and Assess & Define stages will be used to install and configure the Tyler software solution. Software configuration will be validated by the City against future state decisions defined in previous stages and processes refined as needed to ensure business requirements are met.

6.3.1 Initial System Deployment

The timely availability of the Tyler Solution is important to a successful Project implementation. The success and timeliness of subsequent work packages are contingent upon the initial system deployment of Tyler Licensed Software on an approved network and infrastructure. Delays in executing this work package can affect the project schedule.

Objectives:

- All licensed software is installed and operational.
- The City can access the software.

STAGE 3	Initial System Deployment (Hosted/SaaS)*	
	Tyler	City



RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power Users)	Department Heads	End Users	Technical Leads
Prepare hosted environment			A				R				I						C
Install Licensed Software with Initial Database on Server(s) for Included Environments			A				R				I						C
Install Licensed Software on City Devices (if applicable)			I				C				A						R
Tyler System Administration Training (if applicable)			A				R				I						C

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Licensed Software is Installed on the Server(s)	Software is accessible
	Licensed Software is Installed on City Devices (if applicable)	Software is accessible
	Installation Checklist/System Document	System meets prescribed checklist
	Infrastructure Design Document (C&J – If Applicable)	

Work package assumptions:

- The most current available version of the Tyler Licensed Software will be installed.
- The City will provide network access for Tyler modules, printers, and Internet access to all applicable City and Tyler Project staff.

6.3.2 Configuration

The purpose of Configuration is to prepare the software product for validation.

Tyler staff collaborates with the City to complete software configuration based on the outputs of the future state analysis performed during the Assess and Define Stage. The City collaborates with Tyler staff iteratively to validate software configuration.



Objectives:

- Software is ready for validation.
- Educate the City Power User how to configure and maintain software.
- Prepare standard interfaces for process validation (if applicable).

STAGE 3	Configuration																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power Users)	Department Heads	End Users	Technical Leads
Conduct configuration training			A	R							I	C		C			
Complete Tyler configuration tasks (where applicable)			A	R							I	I		I			
Complete City configuration tasks (where applicable)			I	C							A	R		C			
Standard interfaces configuration and training (if applicable)			A	R			C				I	C		C			C
Updates to Solution Validation testing plan			C	C							A	R		C			C

Inputs	Documentation that describes future state decisions and configuration options to support future state decisions.
--------	--

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Configured System	

Work package assumptions:

- Tyler provides guidance for configuration options available within the Tyler software. The City is responsible for making decisions when multiple options are available.

6.3.3 Process Refinement

Tyler will educate the City users on how to execute processes in the system to prepare them for the validation of the software. The City collaborates with Tyler staff iteratively to validate software configuration options to support future state.



Objectives:

- Ensure that the City understands future state processes and how to execute the processes in the software.
- Refine each process to meet the business requirements.
- Validate standard interfaces, where applicable.
- Validate forms and reports, where applicable.

STAGE 3	Process Refinement																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power Users)	Department Heads	End Users	Technical Leads
Conduct process training			A	R							I	C	I	C			
Confirm process decisions			I	C						A	R	C	I	C			
Test configuration			I	C							A	R		C			
Refine configuration (City Responsible)			I	C							A	R		C			
Refine configuration (Tyler Responsible)			A	R							I	I		I			
Validate interface process and results			I	C			C				A	R		C			C
Update City-specific process documentation (if applicable)			I	C							A	R		C			
Updates to Solution Validation testing plan			C	C							A	R		C			C

Inputs	Initial Configuration
	Documentation that describes future state decisions and configuration options to support future state decisions.
	Solution validation test plan

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Updated solution validation test plan	
	Completed City-specific process documentation (completed by City)	



Work package assumptions:

- None

6.3.4 Conversion Delivery

The purpose of this task is to transition the City's data from their source ("legacy") system(s) to the Tyler system(s). The data will need to be mapped from the legacy system into the new Tyler system format. A well-executed data conversion is key to a successful cutover to the new system(s).

With guidance from Tyler, the City will review specific data elements within the system and identify / report discrepancies. Iteratively, Tyler will collaborate with the City to address conversion discrepancies. This process will allow for clean, reconciled data to transfer from the source system(s) to the Tyler system(s). Reference Conversion Appendix for additional detail.



Objectives:

- Data is ready for production (Conversion).

STAGE 3	Data Delivery & Conversion																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power Users)	Department Heads	End Users	Technical Leads
Provide data crosswalks/code mapping tool			A	C	R						I	I		I			



Populate data crosswalks/code mapping tool			I	C	C						A	R		C			
Iterations: Conversion Development			A	C	R						I						I
Iterations: Deliver converted data			A		R			I			I						I
Iterations: Proof/Review data and reconcile to source system			C	C	C						A	R		C			C

Inputs	
	Data Conversion Plan
	Configuration

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Code Mapping Complete / Validated	
	Conversion Iterations / Reviews Complete	Conversion complete, verified, and ready for final pass

Work package assumptions:

- The City will provide a single file layout per source system as identified in the investment summary.
- The City subject matter experts and resources most familiar with the current data will be involved in the data conversion effort.
- The City project team will be responsible for completing the code mapping activity, with assistance from Tyler.

6.3.5 This work package is not applicable.

6.3.6 This work package is not applicable.

6.3.7 Control Point 3: Prepare Solution Stage Acceptance

Acceptance criteria for this Stage includes all criteria listed below in each Work Package.

Note: Advancement to the Production Readiness Stage is dependent upon Tyler's receipt of the Stage Acceptance.

Prepare Solution Stage Deliverables:

- Licensed software is installed.
- Installation checklist/system document.
- Conversion iterations and reviews complete.

Prepare Solution Stage Acceptance Criteria:



- All stage deliverables accepted based on criteria previously defined.
- Software is configured.
- Solution validation test plan has been reviewed and updated if needed.

6.4 Production Readiness

Activities in the Production Readiness stage will prepare the City team for go-live through solution validation, the development of a detailed go-live plan and end user training. A readiness assessment will be conducted with the City to review the status of the project and the organizations readiness for go-live.

6.4.1 Solution Validation

Solution Validation is the end-to-end software testing activity to ensure that the City verifies all aspects of the Project (hardware, configuration, business processes, etc.) are functioning properly, and validates that all features and functions per the contract have been deployed for system use.

Objectives:

- Validate that the solution performs as indicated in the solution validation plan.
- Ensure the City organization is ready to move forward with go-live and training (if applicable).

STAGE 4	Solution Validation																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Update Solution Validation plan			A	R	C						C	C		C			
Update test scripts (as applicable)			C	C	C						A	R		C			
Perform testing			C	C	C						A	R		C			
Document issues from testing			C	C	C						A	R		C			
Perform required follow-up on issues			A	R	C						C	C		C			

Inputs	Solution Validation plan
	Completed work product from prior stages (configuration, business process, etc.)

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Solution Validation Report	City updates report with testing results



Work package assumptions:

- Designated testing environment has been established.
- Testing includes current phase activities or deliverables only.

6.4.2 Go-Live Readiness

Tyler and the City will ensure that all requirements defined in Project planning have been completed and the Go-Live event can occur, as planned. A go-live readiness assessment will be completed identifying risks or actions items to be addressed to ensure the City has considered its ability to successfully Go-Live. Issues and concerns will be discussed, and mitigation options documented. Tyler and the City will jointly agree to move forward with transition to production. Expectations for final preparation and critical dates for the weeks leading into and during the Go-Live week will be planned in detail and communicated to Project teams.

Objectives:

- Action plan for go-live established.
- Assess go-live readiness.
- Stakeholders informed of go-live activities.

STAGE 4	Go-Live Readiness																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Perform Readiness Assessment	I	A	R	C	C	I	C	I	I	I	I		I				I
Conduct Go-Live planning session		A	R	C							C	C	C	C	C		C
Order peripheral hardware (if applicable)			I							A	R						C
Confirm procedures for Go-Live issue reporting & resolution		A	R	I	I	I	I				C	C	I	I	I	I	I
Develop Go-Live checklist		A	R	C	C						C	C	I	C			C
Final system infrastructure review (where applicable)			A				R				C						C

Inputs	Future state decisions
	Go-live checklist

Outputs / Deliverables	Acceptance Criteria [only] for Deliverables
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	Updated go-live checklist	Updated Action plan and Checklist for go-live delivered to the City
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Work package assumptions:

- None

6.4.3 End User Training

End User Training is a critical part of any successful software implementation. Using a training plan previously reviewed and approved, the Project team will organize and initiate the training activities.

Train the Trainer: Tyler provides one occurrence of each scheduled training or implementation topic. City users who attended the Tyler sessions may train additional users. Additional Tyler led sessions may be contracted at the applicable rates for training.

Tyler will provide standard application documentation for the general use of the software. It is not Tyler's responsibility to develop City specific business process documentation. City-led training labs using City specific business process documentation if created by the City can be added to the regular training curriculum, enhancing the training experiences of the end users.

Objectives:

- End users are trained on how to use the software prior to go-live.
- The City is prepared for on-going training and support of the application.

STAGE 4	End User Training																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Update training plan		A	R	C							C		I		C		
End User training (Tyler-led)		A	R	C							C	C	I	C	C	C	
Train-the-trainer		A	R	C							C	C	I	C			
End User training (City-led)			C	C							A	R	I	C	C	C	

Inputs	Training Plan
	List of End Users and their Roles / Job Duties
	Configured Tyler System

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	End User Training	City signoff that training was delivered



Work package assumptions:

- The City project team will work with Tyler to jointly develop a training curriculum that identifies the size, makeup, and subject-area of each of the training classes.
- Tyler will work with the City as much as possible to provide end-user training in a manner that minimizes the impact to the daily operations of City departments.
- The City will be responsible for training new users after go-live (exception—previously planned or regular training offerings by Tyler).

6.4.4 Control Point 4: Production Readiness Stage Acceptance

Acceptance criteria for this stage includes all criteria listed below. Advancement to the Production stage is dependent upon Tyler's receipt of the stage acceptance.

Production Readiness stage deliverables:

- Solution Validation Report.
- Update go-live action plan and/or checklist.
- End user training.

Production Readiness stage acceptance criteria:

- All stage deliverables accepted based on criteria previously defined.
- Go-Live planning session conducted.

6.5 Production

Following end user training the production system will be fully enabled and made ready for daily operational use as of the scheduled date. Tyler and the City will follow the comprehensive action plan laid out during Go-Live Readiness to support go-live activities and minimize risk to the Project during go-live. Following go-live, Tyler will work with the City to verify that implementation work is concluded, post go-live activities are scheduled, and the transition to Client Services is complete for long-term operations and maintenance of the Tyler software.

6.5.1 Go-Live

Following the action plan for Go-Live, defined in the Production Readiness stage, the City and Tyler will complete work assigned to prepare for Go-Live.

The City provides final data extract and Reports from the Legacy System for data conversion and Tyler executes final conversion iteration, if applicable. If defined in the action plan, the City manually enters any data added to the Legacy System after final data extract into the Tyler system.

Tyler staff collaborates with the City during Go-Live activities. The City transitions to Tyler software for day-to-day business processing.

Some training topics are better addressed following Go-Live when additional data is available in the system or based on timing of applicable business processes and will be scheduled following Go-Live per the Project Schedule.



Objectives:

- Execute day to day processing in Tyler software.
- City data available in Production environment.

STAGE 5	Go-Live																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Provide final source data extract, if applicable			C		C						A						R
Final source data pushed into production environment, if applicable			A	C	R						I	C		C			C
Proof final converted data, if applicable			C	C	C						A	R		C			
Complete Go-Live activities as defined in the Go-Live action plan			C	C	C					A	R	C	I	C			
Provide Go-Live assistance			A	R	C	C		I			C	C	I	C		I	C

Inputs	Comprehensive Action Plan for Go-Live
	Final source data (if applicable)

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Data is available in production environment	City confirms data is available in production environment

Work package assumptions:

- The City will complete activities documented in the action plan for Go-Live as scheduled.
- External stakeholders will be available to assist in supporting the interfaces associated with the Go-Live live process.
- The City business processes required for Go-Live are fully documented and tested.
- The City Project team and subject matter experts are the primary point of contact for the end users when reporting issues during Go-Live.
- The City Project Team and Power User's provide business process context to the end users during Go-Live.



6.5.2 Transition to Client Services

This work package signals the conclusion of implementation activities for the Phase or Project with the exception of agreed-upon post Go-Live activities. The Tyler project manager(s) schedules a formal transition of the City onto the Tyler Client Services team, who provides the City with assistance following Go-Live, officially transitioning the City to operations and maintenance.

Objectives:

- Ensure no critical issues remain for the project teams to resolve.
- Confirm proper knowledge transfer to the City teams for key processes and subject areas.

STAGE 5	Transition to Client Services																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Transfer City to Client Services and review issue reporting and resolution processes	I	I	A	I	I			R	I	I	C	C		C			
Review long term maintenance and continuous improvement			A					R			C	C		C			

Inputs	Open item/issues List
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Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Client Services Support Document	

Work package assumptions:

- No material project issues remain without assignment and plan.

6.5.3 Post Go-Live Activities

Some implementation activities are provided post-production due to the timing of business processes, the requirement of actual production data to complete the activities, or the requirement of the system being used in a live production state.

Objectives:



- Schedule activities that are planned for after Go-Live.
- Ensure issues have been resolved or are planned for resolution before phase or project close.

STAGE 5	Post Go-Live Activities																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Schedule contracted activities that are planned for delivery after go-live		A	R	C	C	C	C	I			C	C	I	C			C
Determine resolution plan in preparation for phase or project close out		A	R	C	C	C		I			C	C	I	C			

Inputs	List of post Go-Live activities
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Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Updated issues log	

Work package assumptions:

- System is being used in a live production state.

6.5.4 Control Point 5: Production Stage Acceptance

Acceptance criteria for this Stage includes completion of all criteria listed below:

- Advancement to the Close stage is not dependent upon Tyler's receipt of this Stage Acceptance.
- Converted data is available in production environment.

Production Stage Acceptance Criteria:

- All stage deliverables accepted based on criteria previously defined.
- Go-Live activities defined in the Go-Live action plan completed.
- Client services support document is provided.



6.6 Close

The Close stage signifies full implementation of all products purchased and encompassed in the Phase or Project. The City transitions to the next cycle of their relationship with Tyler (next Phase of implementation or long-term relationship with Tyler Client Services).

6.6.1 Phase Closeout

This work package represents Phase completion and signals the conclusion of implementation activities for the Phase. The Tyler Client Services team will assume ongoing support of the City for systems implemented in the Phase.

Objectives:

- Agreement from Tyler and the City teams that activities within this phase are complete.

STAGE 6	Phase Close Out																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Reconcile project budget and status of contract Deliverables	I	A	R						I	I	C						
Hold post phase review meeting		A	R	C	C	C	C				C	C	C	C			C
Release phase-dependent Tyler project resources	A	R	I								I						

Participants	Tyler	City
	Project Leadership	Project Manager
	Project Manager	Project Sponsor(s)
	Implementation Consultants	Functional Leads, Power Users, Technical Leads
	Technical Consultants (Conversion, Deployment, Development)	
	Client Services	

Inputs	Contract
	Statement of Work
	Project artifacts



Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
	Final action plan (for outstanding items)	
	Reconciliation Report	
	Post Phase Review	

Work package assumptions:

- Tyler deliverables for the phase have been completed.

6.6.2 Project Closeout

Completion of this work package signifies final acceptance and formal closing of the Project.

At this time the City may choose to begin working with Client Services to look at continuous improvement Projects, building on the completed solution.

Objectives:

- Confirm no critical issues remain for the project teams to resolve.
- Determine proper knowledge transfer to the City teams for key processes and subject areas has occurred.
- Verify all deliverables included in the Agreement are delivered.

STAGE 6	Project Close Out																
	Tyler								City								
RACI MATRIX KEY: R = Responsible A = Accountable C = Consulted I = Informed	Executive Manager	Implementation Manager	Project Manager	Implementation Consultant	Data Experts	Modification Services	Technical Services	Client Services	Executive Sponsor	Steering Committee	Project Manager	Functional Leads	Change Management Leads	Subject Matter Experts (Power	Department Heads	End Users	Technical Leads
Conduct post project review		A	R	C	C	C	C				C	C	C	C			C
Deliver post project report to City and Tyler leadership	I	A	R						I	I	C						
Release Tyler project resources	A	R	I								I						

Inputs	Contract
	Statement of Work

Outputs / Deliverables		Acceptance Criteria [only] for Deliverables
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	Post Project Report	City acceptance; Completed report indicating all project Deliverables and milestones have been completed
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Work package assumptions:

- All project implementation activities have been completed and approved.
- No critical project issues remain that have not been documented and assigned.
- Final project budget has been reconciled and invoiced.
- All Tyler deliverables have been completed.

6.6.3 Control Point 6: Close Stage Acceptance

Acceptance criteria for this Stage includes completion of all criteria listed below.

Close Stage Deliverables:

- Post Project Report.

Close Stage Acceptance Criteria:

- Completed report indicating all Project deliverables and milestones have been completed.

7. General Assumptions

Tyler and the City will use this SOW as a guide for managing the implementation of the Tyler Project as provided and described in the Agreement. There are a few assumptions which, when acknowledged and adhered to, will support a successful implementation. Assumptions related to specific work packages are documented throughout the SOW. Included here are general assumptions which should be considered throughout the overall implementation process.

7.1 Project

- Project activities will begin after the Agreement has been fully executed.
- The City Project Team will complete their necessary assignments in a mutually agreed upon timeframe to meet the scheduled go-live date, as outlined in the Project Schedule.
- Sessions will be scheduled and conducted at a mutually agreeable time.
- Additional services, software modules and modifications not described in the SOW or Agreement will be considered a change to this Project and will require a Change Request Form as previously referenced in the definition of the Change Control Process.
- Tyler will provide a written agenda and notice of any prerequisites to the City project manager(s) ten (10) business days or as otherwise mutually agreed upon time frame prior to any scheduled on-site or remote sessions, as applicable.
- Tyler will provide guidance for configuration and processing options available within the Tyler software. If multiple options are presented by Tyler, the City is responsible for making decisions based on the options available.
- Implementation of new software may require changes to existing processes, both business and technical, requiring the City to make process changes.



- The City is responsible for defining, documenting, and implementing their policies that result from any business process changes.

7.2 Organizational Change Management

Unless otherwise contracted by Tyler, City is responsible for managing Organizational Change. Impacted City resources will need consistent coaching and reassurance from their leadership team to embrace and accept the changes being imposed by the move to new software. An important part of change is ensuring that impacted City resources understand the value of the change, and why they are being asked to change.

7.3 Resources and Scheduling

- City resources will participate in scheduled activities as assigned in the Project Schedule.
- The City team will complete prerequisites prior to applicable scheduled activities. Failure to do so may affect the schedule.
- Tyler and the City will provide resources to support the efforts to complete the Project as scheduled and within the constraints of the Project budget.
- Abbreviated timelines and overlapped Phases require sufficient resources to complete all required work as scheduled.
- Changes to the Project Schedule, availability of resources or changes in Scope will be requested through a Change Request. Impacts to the triple constraints (scope, budget, and schedule) will be assessed and documented as part of the change control process.
- The City will ensure assigned resources will follow the change control process and possess the required business knowledge to complete their assigned tasks successfully. Should there be a change in resources, the replacement resource should have a comparable level of availability, change control process buy-in, and knowledge.
- The City makes timely Project related decisions to achieve scheduled due dates on tasks and prepare for subsequent training sessions. Failure to do so may affect the schedule, as each analysis and implementation session is dependent on the decisions made in prior sessions.
- The City will respond to information requests in a comprehensive and timely manner, in accordance with the Project Schedule.
- The City will provide adequate meeting space or facilities, including appropriate system connectivity, to the project teams including Tyler team members.
- For on-site visits, Tyler will identify a travel schedule that balances the needs of the project and the employee.

7.4 Data

- Data will be converted as provided and Tyler will not create data that does not exist.
- The City is responsible for the quality of legacy data and for cleaning or scrubbing erroneous legacy data.
- Tyler will work closely with the City representatives to identify business rules before writing the conversion. The City must confirm that all known data mapping from source to target have been identified and documented before Tyler writes the conversion.
- All in-scope source data is in data extract(s).
- Each legacy system data file submitted for conversion includes all associated records in a single approved file layout.



- The City will provide the legacy system data extract in the same format for each iteration unless changes are mutually agreed upon in advance. If not, negative impacts to the schedule, budget and resource availability may occur and/or data in the new system may be incorrect.
- The City Project Team is responsible for reviewing the converted data and reporting issues during each iteration, with assistance from Tyler.
- The City is responsible for providing or entering test data (e.g., data for training, testing interfaces, etc.)

7.5 Facilities

- The City will provide dedicated space for Tyler staff to work with City resources for both on-site and remote sessions. If Phases overlap, City will provide multiple training facilities to allow for independent sessions scheduling without conflict.
- The City will provide staff with a location to practice what they have learned without distraction.



8. Glossary

Word or Term	Definition
Acceptance	Confirming that the output or deliverable is suitable and conforms to the agreed upon criteria.
Accountable	The one who ultimately ensures a task or deliverable is completed; the one who ensures the prerequisites of the task are met and who delegates the work to those responsible. [Also see RACI]
Application	A computer program designed to perform a group of coordinated functions, tasks, or activities for the benefit of the user.
Application Programming Interface (API)	A defined set of tools/methods to pass data to and received data from Tyler software products
Agreement	This executed legal contract that defines the products and services to be implemented or performed.
Business Process	The practices, policy, procedure, guidelines, or functionality that the client uses to complete a specific job function.
Business Requirements Document	A specification document used to describe Client requirements for contracted software modifications.
Change Request	A form used as part of the Change Control process whereby changes in the scope of work, timeline, resources, and/or budget are documented and agreed upon by participating parties.
Change Management	Guides how we prepare, equip and support individuals to successfully adopt change in order to drive organizational success & outcomes
Code Mapping [where applicable]	An activity that occurs during the data conversion process whereby users equate data (field level) values from the old system to the values available in the new system. These may be one to one or many to one. Example: Old System [Field = eye color] [values = BL, Blu, Blue] maps to New Tyler System [Field = Eye Color] [value = Blue].
Consulted	Those whose opinions are sought, typically subject matter experts, and with whom there is two-way communication. [Also see RACI]
Control Point	This activity occurs at the end of each stage and serves as a formal and intentional opportunity to review stage deliverables and required acceptance criteria for the stage have been met.
Data Mapping [where applicable]	The activity determining and documenting where data from the legacy system will be placed in the new system; this typically involves prior data analysis to understand how the data is currently used in the legacy system and how it will be used in the new system.
Deliverable	A verifiable document or service produced as part of the Project, as defined in the work packages.
Go-Live	The point in time when the Client is using the Tyler software to conduct daily operations in Production.
Informed	Those who are kept up-to-date on progress, often only on completion of the task or deliverable, and with whom there is just one-way communication. [Also see RACI]



Infrastructure	The composite hardware, network resources and services required for the existence, operation, and management of the Tyler software.
Interface	A connection to and potential exchange of data with an external system or application. Interfaces may be one way, with data leaving the Tyler system to another system or data entering Tyler from another system, or they may be bi-directional with data both leaving and entering Tyler and another system.
Integration	A standard exchange or sharing of common data within the Tyler system or between Tyler applications
Legacy System	The software from which a client is converting.
Modification	Custom enhancement of Tyler's existing software to provide features or functions to meet individual client requirements documented within the scope of the Agreement.
On-site	Indicates the work location is at one or more of the client's physical office or work environments.
Organizational Change	The process of changing an organization's strategies, processes, procedures, technologies, and culture, as well as the effect of such changes on the organization.
Output	A product, result or service generated by a process.
Peripheral devices	An auxiliary device that connects to and works with the computer in some way. Some examples: scanner, digital camera, printer.
Phase	A portion of the Project in which specific set of related applications are typically implemented. Phases each have an independent start, Go-Live and closure dates but use the same Implementation Plans as other Phases of the Project. Phases may overlap or be sequential and may have different Tyler resources assigned.
Project	The delivery of the software and services per the agreement and the Statement of Work. A Project may be broken down into multiple Phases.
RACI	A matrix describing the level of participation by various roles in completing tasks or Deliverables for a Project or process. Individuals or groups are assigned one and only one of the following roles for a given task: Responsible (R), Accountable (A), Consulted (C), or Informed (I).
Remote	Indicates the work location is at one or more of Tyler's physical offices or work environments.
Responsible	Those who ensure a task is completed, either by themselves or delegating to another resource. [Also see RACI]
Scope	Products and services that are included in the Agreement.



Solution	The implementation of the contracted software product(s) resulting in the connected system allowing users to meet Project goals and gain anticipated efficiencies.
Stage	The top-level components of the WBS. Each Stage is repeated for individual Phases of the Project.
Standard	Software functionality that is included in the base software (off-the-shelf) package; is not customized or modified.
Statement of Work (SOW)	Document which will provide supporting detail to the Agreement defining Project-specific activities, services, and Deliverables.
System	The collective group of software and hardware that is used by the organization to conduct business.
Test Scripts	The steps or sequence of steps that will be used to validate or confirm a piece of functionality, configuration, enhancement, or Use Case Scenario.
Training Plan	Document(s) that indicate how and when users of the system will be trained relevant to their role in the implementation or use of the system.
Validation (or to validate)	The process of testing and approving that a specific Deliverable, process, program, or product is working as expected.
Work Breakdown Structure (WBS)	A hierarchical representation of a Project or Phase broken down into smaller, more manageable components.
Work Package	A group of related tasks within a project.



Part 4: Appendices

9. Conversion

9.1 Enterprise Permitting & Licensing Conversion Summary

9.1.1 Community Development

- Permit Master basic information
- Plan Master basic information
- Plan & Permit Contacts
- Unique (keyed) contacts converted to global contacts
- Non-keyed contacts converted to a Memo Custom Field or standard note
- Sub-permit Associations – Visible in Workflow and Attached Records
- Reviews and Approvals
- Projects
- Permit Renewals
- Bonds and Escrow
- Contractors
- Workflow based on configured Enterprise Permitting & Licensing template customized only by inclusion/exclusion based on status, type or class of the associated permit, plan, etc.
- Inspections and Inspection Cases
- Meetings and Hearings
- Activities and Actions
- Conditions
- Fees
- Holds
- Notes
- Parcels and Addresses
- Payments and Fee History
- Zones
- Code Case Master basic information
- Code Requests
- Code Case Contacts and Properties
- Unique (keyed) contacts converted to global contacts
- Non-keyed contacts converted to a Memo Custom Field or standard note
- Violations
- Fees
- Payments
- Notes



9.2 Enterprise ERP Conversion Summary

9.2.1 Accounting

9.2.1.1 Accounting - Actuals

- Summary account balances
- Up to 5 years

9.2.1.2 Accounting - Budgets

- Original budget, budget adjustments, revised budget summaries for accounts
- Up to 5 years

9.2.2 Accounts Payable

9.2.2.1 Vendors

- Vendor Master file including names, addresses, SSN/FID, contacts, phone numbers
- Multiple remittance addresses
- Year-to-date 1099 amounts

9.2.2.2 Accounts Payable - Checks

- Check header data including vendor, warrant, check number, check date, overall check amount, GL cash account and clearing information
- Check detail data including related document and invoice numbers for each check
- Up to 5 years

9.2.2.3 Accounts Payable - Invoices

- Invoice header data containing general information for the invoice
- Invoice detail data containing line-specific information for the invoice
- Up to 5 years

9.2.3 Contracts

- Contract header detail with many fields available to convert including fiscal year and period, vendor number, department code, description, enforcement method code, dates for award, approval, entry and expiration, retention information, user-defined type and review codes, status code, user id for entry and approver. Additional fields are also available. A balance forward contract amount is converted, if original amount is required there will be an additional charge and contracts, po's and invoices must be converted together.

9.2.4 Project Accounting

9.2.4.1 Project Accounting Master Tables

- Segments, account strings and fund string allocation table
- Requires the use of a Tyler provided (Chart of Accounts) spreadsheet for design and entry of the data to be converted



9.2.4.2 Project Accounting - Actuals

- Summary project ledger string balances. If linking to GL, must be converted at the same time.
- Up to 3 years

9.2.4.3 Project Accounting – Budget

- Original project ledger budget amounts. If linking to GL, must be converted at the same time.
- Up to 3 years

9.2.5 Purchase Orders

- Open purchase orders header data including vendor, buyer, date, accounting information, etc.
- Open purchase orders detail data including line-item descriptions, quantities, amounts, etc.
- Closed purchase orders detail data, up to 5 years, including line-item descriptions, quantities, amounts, etc.

9.2.6 Human Resources Management

9.2.6.1 HRM Employee Master Information

- Payroll Employee Master data including data such as name, address, SSN, legacy employee ID, date of birth, hire date, activity status (such as active/inactive), leave/termination code and date, phone(s), e-address, marital status, gender, race, personnel status (such as full-time, part-time, etc.), highest degree, advice-delivery (print/email/both) and check location, plus primary group, job, location, and account information

9.2.6.2 Accumulators

- YTD, QTD, MTD amounts for employee pay and deductions
- Needed for mid-calendar-year go-live
- May not be needed if converting earnings/deductions history
- Up to 5 years
- Accumulators are converted with check history and earning/deduction history as a default. No accumulator files are necessary to submit when converting history.

9.2.6.3 Check History

- Up to 5 years, additional years must be quoted. We convert amounts for earnings and deductions in employee check history, check number and date.

9.2.6.4 Earning/Deduction Hist.

- Up to 5 years, additional years must be quoted. Earning and deduction history broken down by individual codes (earnings and deduction) and amounts per pay period, the detail of these lines, sums the check history in opt 4.

9.2.6.5 Personnel Action History

- A variety of Personnel actions, such as job or salary changes and dates these events occurred.
- Up to 5 years



9.2.6.6 Certifications

- Certification area and certification type codes, certification number and effective date, expiration date, and required-by date, codes for certification level and subjects

9.2.6.7 Education

- Codes, for institution, type of degree, and area(s) of study

9.2.7 General Billing

9.2.7.1 Customer Master Files

- Customer information

9.2.7.2 General Billing – Recurring Invoices

- General Billing Invoices that are sent on a regular basis
- Header records with general information about the invoice
- Detail records with line-specific information

9.2.7.3 General Billing – Bills

- 5 years of open and closed invoices
- General Ledger information so open invoices can be processed in Enterprise ERP

9.2.8 Utility Billing

9.2.8.1 Account Information

- Account Master data including previous and current customer owner information- address info, phone, fax, SSN number, FID number, account status, parcel number, location street, apartment, city, state, zip, book number, read sequence, account start and end date, EFT bank information

9.2.8.2 Services

- Current service codes, service status, type, factor, condo units, bill cycle codes, , current deposits held on account including unpaid deposit amounts, winter usage, current meter(s) associated with service, meter readings(current and previous), meter usage (current and previous) and sales tax information.

9.2.8.3 Assessments

- Assessments are improvement costs that are spread across to property owner
- Utility Billing conversion option 4 (balance forward AR) must also be purchased in order to convert assessments

9.2.8.4 Consumption History

- History of meter readings, usage, read dates, usage days, bill amounts, bill dates, read codes
- Up to 5 years



9.2.8.5 Balance Forward AR

- Account balance forward information converted as total amount due. If the client's business practices require current due and past due bills this can be broken into three balance forward bills(current balance due and up to two past due balance bills).These can be converted to one balance forward charge code or separate balance forward charge codes, and converted to the account/customer, if the client's legacy data contains this information.
- If late penalties will be applied in Enterprise ERP after the conversion, balance forward amounts must be converted by charge code

9.2.8.6 Work Orders

- Work Orders data associated with accounts, including meter repairs, checks for leaky meter, reread a meter due to high reading

9.2.8.7 Backflow

- Account information, backflow device information, backflow type, and backflow violations

9.2.8.8 Budget Billing

- Converts information for budget average billing by account, customer and service. Legacy data must include: calculated budget amount by service; number of periods remaining until plan renews; budget plan balance/credit amount, broken out by service/customer; additional amortized amount by service.

9.2.8.9 Flat Inventory/Containers

- Inventory for non-metered items tied to recurring service billing – flat rate is tied to inventory item(s)/item type(s) (vs consumption/usage). Trash/recycling containers, dumpsters, roll off containers, light poles, cable/internet equipment.



10. Additional Appendices

10.1 Enterprise Permitting & Licensing Definitions

10.1.1 “Template Business Transactions”

- A pre-defined and pre-configured Enterprise Permitting & Licensing business process from Enterprise Permitting & Licensing’s “Best Management Template”.
- The following modifications to Template Business Transactions are considered within scope:
 - Any changes to required inspections within the workflow
 - Any changes to the required plan reviews within the workflow
 - Adding up to 2 additional actions to the workflow
 - Configuration of fees, allowing creation of up to 3 new fees to accommodate
 - Any changes to custom field layouts that are directly related to fees or included reports
- Customization/Configuration of any of these parameters beyond the scope listed above will require the respective business process to be considered a “Unique Business Transaction”, as described below.

Note: All transaction counts are quantified in the comments of the Investment Summary.

10.1.2 “Unique Business Transactions”

- Unique configuration of workflow or business process steps & actions, including output actions
- Unique Fee configuration
- Unique Custom field configuration

10.1.3 “Geo-Rules”

- An automation event that references GIS data. Current geo-rule action types are:

Alert	Displays a pop-up with a custom message to the user, notifying them of certain spatial data (i.e., noise abatement zones; flood zones; etc.).
Block	Places a block on the case and prevents any progress or updates from occurring on the record (i.e., no status changes can be completed, no fees can be paid, the workflow cannot be managed, etc.)
Block with Override	Places a block on the case and prevents any progress or updates from occurring on the record (i.e., no status changes can be completed, no fees can be paid, the workflow cannot be managed, etc.) However, the block can be overridden by end-users who have been given the proper securities.
Fee Date	Populates the CPI vesting date on the record if vesting maps are used by the jurisdiction.
Field Mapping	A custom field or any field inherent in the Enterprise Permitting & Licensing application can automatically populate with information based on spatial data.
Required Action	A workflow action can automatically populate in the workflow details for the particular record (i.e., plan, permit, code case, etc.) that requires the action based on certain spatial data related to the case.
Required Step	A workflow step can automatically populate in the workflow details for the particular record (i.e., plan, permit, code case, etc.) that requires the step based on certain spatial data related to the case.
Zone Mapping	The zone(s) automatically populate on the “Zones” tab of the record (i.e., plan, permit, code case, etc.).



10.1.4 “Automation Events”

10.1.4.1 “Intelligent Objects (IO)”

- Key components for automatically and reactively triggering geo-rules, computing fees, and generating emails, alerts, and other notifications.

10.1.4.2 “Intelligent Automation Agents (IAA)”

- A tool designed to automate task in a proactive manner by setting values and generating emails and other tasks. On a nightly basis, a Windows service sweeps the Enterprise Permitting & Licensing system looking for IAA tasks that need to be run, then the associated actions are performed. The IAA does not generate alerts or errors. Custom SQL queries are not Tyler deliverables.

10.1.5 “Enterprise Permitting & Licensing SDK/API (Toolkits)”

- APIs developed by Tyler Technologies for extending the Enterprise Permitting & Licensing Framework and functionality to external agencies and systems. Full documentation is available for each toolkit upon request.

Note: The Enterprise Permitting & Licensing toolkits and related documentation are simply tools that allow clients to create applications and integrations. The purchase of a toolkit/API does not imply any development related services from Tyler Technologies. The City is responsible for working with their IT staff and VARs to develop any necessary applications and integrations except as otherwise noted in the Investment Summary or for any “in-scope” integrations.

10.2 This work package is not applicable.



11. Project Timeline

11.1 ERP Project Timeline

The Project Timeline establishes a target duration for each phase of the project. The timeline needs to account for resource availability, business goals, size and complexity of the project, and task duration requirements. These will be reviewed and adjusted, if needed, during the Initiate and Plan Stage. Refer to the Project Stages section of this SOW for information on work packages associated with each stage of the implementation. Durations may be revised when the Agreement is signed and further refined during the project.

Eden to Enterprise ERP project start dates are dependent on wave availability. Waves are a common implementation start month for a group of Eden clients. Each wave has a designated number of slots available for clients to sign up – once those slots are full you must choose an alternate wave with availability. A signed agreement is required to reserve your spot in a wave.

Phase	Functional Area(s)	Modules	Duration
1	Financials	- Accounting - Accounts Payable - Budgeting - Capital Assets - Cash Management - Contract Management - eProcurement (Vendor Access and Punch-Out) - Project & Grant Accounting - Purchasing - Accounts Receivable - General Billing - Cashiering	12 Months or as defined in the Project Plan and mutually agreed upon
	System Wide	- Enterprise Analytics & Reporting w Executive Insights - Enterprise Forms - Content Manager Core includes Onboarding	
2	Human Resources Management	- Payroll with Employee Access - Human Resources & Talent Management - Time & Attendance with Mobile Access	12 Months or as defined in the Project Plan and mutually agreed upon
3	Advanced Scheduling	Advanced Scheduling with Mobile Access	3 Months or as defined in the Project Plan and mutually agreed upon



4	Enterprise Permit & Licensing	• Community Development Suite • Civic Access – Community Development • Decision Engine • e-Reviews • EPL Advanced Automation Bundle • EPL Core Foundation Bundle • EPL Mobile • GIS	12 Months or as defined in the Project Plan and mutually agreed upon
5	Utility Billing	• Utility Billing CIS • Utility Billing Meter Interface • Resident Access • Central Property File • Notify	12 Months or as defined in the Project Plan and mutually agreed upon

11.2 This work package is not applicable.



EXHIBIT F

DATA-SHARING AGREEMENT BETWEEN THE CITY OF BONNEY LAKE AND TYLER TECHNOLOGIES, INC.

THIS DATA SHARING AGREEMENT is made by and between the City of Bonney Lake, a Washington municipal corporation (hereinafter the "**City**"), and Tyler Technologies, Inc., a Delaware corporation having its principal place of business at 5101 Tennyson Pkwy, Plano, TX (hereinafter the "**Provider**") (individually a "**Party**" and collectively "**Parties**").

RECITALS

WHEREAS, the City and the Provider have entered into a Software as a Service (SaaS) Agreement (SaaS Agreement) to which this Data Sharing Agreement is attached as Exhibit F;

WHEREAS, the services provided by the Provider are related to certain products and services set forth in the Investment Summary (Exhibit A of the SaaS Agreement), including providing the City with access to the Provider's proprietary software products, and the Provider desires to provide such products and services to the City under the terms of the SaaS Agreement;

NOW, THEREFORE, in consideration of the mutual promises set forth in in the SaaS Agreement and herein, it is agreed by and between the parties as follows:

1. Background

Cities have compelling reasons to enter into SaaS agreements with companies like the Provider. SaaS solutions eliminate the need for expensive on-premises infrastructure and maintenance, allowing cities to access software via the cloud and reducing both upfront costs and ongoing expenses. Additionally, SaaS platforms are easily scalable, enabling cities of any size to benefit from the same features and improvements without the need for custom development. This agility allows governments to quickly adapt to changing needs and deliver services efficiently.

2. Purpose and Authority for Data Sharing

The purpose for sharing Data is to make Data available to the City or Provider or an individual who has a right to access the Data in a manner that satisfies the Parties' legal obligations to conduct the agreed upon duties and business, and including specifically with respect to Provider, for purposes of Provider fulfilling its obligations and providing the products and services pursuant to the SaaS Agreement.

The purpose of this Data-Sharing Agreement is to describe the duties associated with the provision of Data to the Provider for the purposes of the City's use of Provider's SaaS as described in the SaaS Agreement.

3. Definitions

“Authorized User” means an individual or individuals with an authorized business need to access Confidential Information under this DSA.

“Confidential Information” means information that is exempt from disclosure to the public or other unauthorized persons under RCW Chapter 42.56 or other federal or state laws. Confidential Information comprises both Category 3 and Category 4 Data as described in Section 5, *Data Classification*, which includes, but is not limited to, financial information, consumer payment, financial data, or personal information. For purposes of this DSA, Confidential Information means the same as “Data.”

“Contract Administrator” means the individual designated by the City in writing to Provider to receive legal notices and to administer or amend this DSA.

“Data” means the information that is disclosed or exchanged as described by this DSA. For purposes of this DSA, Data means the same as “Confidential Information.”

“Disclosing Party” means any party disclosing Confidential Information pursuant to this DSA, and includes the entity’s owners, members, officers, directors, partners, trustees, employees, and Subcontractors and their owners, members, officers, directors, partners, trustees, and employees.

“Disclosure” means the release, transfer, provision of, access to, or divulging in any other manner of information outside the entity holding the information.

“DSA” means this Data-Share Agreement.

“RCW” means the Revised Code of Washington. All references in this DSA to RCW chapters or sections will include any successor, amended, or replacement statute. Pertinent RCW chapters can be accessed at: <http://apps.leg.wa.gov/rcw/>.

“Regulation” means any federal, state, or local regulation, rule, or ordinance.

“Receiving Party” means any party receiving Confidential Information pursuant to this DSA, and includes the entity’s owners, members, officers, directors, partners, trustees, employees, and Subcontractors and their owners, members, officers, directors, partners, trustees, and employees.

“Subcontract” means any separate agreement or contract between a Receiving Party and an individual or entity (“Subcontractor”) to perform any duties that give rise to a business requirement to access the Data that is the subject of this DSA.

“Subcontractor” means a person or entity that is not in the employment of the Receiving Party, who is performing services or any duties that give rise to a business requirement to access the Data that is the subject of this DSA.

“WAC” means the Washington Administrative Code. All references in this DSA to WAC chapters or sections will include any successor, amended, or replacement regulation. Pertinent WAC chapters or sections can be accessed at:
<http://apps.leg.wa.gov/wac/>.

4. Description of Data to be Shared

The Data that will be shared by a Disclosing Party may include financial information, consumer payment, financial data, and/or personally identifiable information necessary for the parties to accomplish and perform the services, duties and legal obligations agreed upon to conduct their businesses.

5. Data Classification

The State classifies data into categories based on the sensitivity of the data pursuant to the Security policy and standards promulgated by the Office of the State of Washington Chief Information Officer (OCIO) and included in OCIO Standard No. 141.10.

The Data that is the subject of this DSA is classified as indicated below:

☐ Category 1 – Public Information

Public information is information that can be or currently is released to the public. It does not need protection from unauthorized disclosure but does need integrity and availability protection controls.

☐ Category 2 – Sensitive Information

Sensitive information may not be specifically protected from disclosure by law and is for official use only. Sensitive information is generally not released to the public unless specifically requested.

☒ Category 3 – Confidential Information

Confidential information is information that is specifically protected from release or disclosure by law. It may include but is not limited to:

- a. Personal information about individuals, regardless of how that information is obtained;
- b. Information concerning employee personnel records;
- c. Information regarding IT infrastructure and security of computer and telecommunications systems;

☒ Category 4 – Confidential Information Requiring Special Handling

Confidential information requiring special handling is information that is specifically protected from disclosure by law and for which:

- a. Especially strict handling requirements are dictated, such as by statutes, regulations, or agreements; or
- b. Serious consequences could arise from unauthorized disclosure, such as threats to health and safety, or legal sanctions.

6. Constraints on Use of Data

- 6.1. The Data being shared is owned by the Disclosing Party that created it. In some cases, the Data may represent Confidential Information of multiple Disclosing Parties.
- 6.2. This DSA does not constitute a release of the Data for the Receiving Party's discretionary use. The Receiving Party must use the Data received or accessed under this DSA only to carry out the purpose and justification of this Agreement as set out in section 2, Purpose and Authority for Data Sharing. Any analysis, use, or reporting that is not within the Purpose of this DSA is not permitted.
- 6.3. Any disclosure of Data contrary to this DSA is unauthorized and is subject to penalties identified in law.

7. Security of Data

7.1. Data Protection

The Receiving Party must protect and maintain all Confidential Information gained by reason of this DSA against unauthorized use, access, disclosure, modification or loss. This duty requires the Receiving Party to employ reasonable security measures, which include restricting access to the Confidential Information by:

- a. Allowing access only to staff that have an authorized business requirement to view the Confidential Information; and
- b. Physically securing any computers, documents, or other media containing the Confidential Information.

7.2. Data Security Standards

Receiving Party must use appropriate safeguards, and comply, where applicable, with state and federal law, as well as implement appropriate physical, technical, and administrative safeguards to prevent use or disclosure of financial information, consumer payment, financial data, and/or personally identifiable information protected by applicable law. See Section B(6) of the SaaS Agreement for a description of Provider's security standards.

7.3. Data Disposition

Upon reasonable advance request or, within 30 days after termination of the SaaS Agreement for any reason or when no longer needed as determined by the City, the Provider shall return to the City, in a format as may be mutually agreed upon and provided through Provider's FTP server or such other secure method reasonably selected by Provider, or destroy all Confidential Information received from the City, or created, maintained, or received by the Provider on behalf of the City that the Provider maintains in any form. The Provider shall retain no copies of the Confidential Information. Notwithstanding the foregoing, Provider may retain one copy of Data in its archives: (i) for so long as is, and only to the extent, required by applicable law, rule, regulation of any competent judicial, governmental, supervisory or regulatory body, or (ii) to the extent such Data is stored in the course of Provider's automatic back-up, disaster recovery procedures and that is not regularly accessible and is subject to Provider's regular deletion policies.

8. Data Confidentiality and Non-Disclosure

8.1. Data Confidentiality

The Receiving Party will not use, publish, transfer, sell, or otherwise disclose any Confidential Information gained by reason of this DSA for any purpose that is not directly connected with the purpose and justification of this DSA, as set out in Sections **Error! Reference source not found.** and 2 above, except as provided by law.

8.2. Non-Disclosure of Data

The Receiving Party must ensure that all staff or Subcontractors who will have access to the Data described in this DSA (including both staff who will use the Data and IT support staff) are instructed and made aware of the use restrictions and protection requirements of this DSA before gaining access to the Data identified herein. The Receiving Party will also instruct and make any new employee aware of the use restrictions and protection requirements of this DSA before they gain access to the Data.

8.3. Penalties for Unauthorized Disclosure of Data

State and federal laws may prohibit unauthorized access, use, or disclosure of Confidential Information. Violation of these laws may result in criminal or civil penalties or fines.

Subject to Section G(4) of the SaaS Agreement, the Receiving Party accepts full responsibility and liability for any noncompliance by itself, its employees, and its Subcontractors with these laws and any violations of the DSA. General indemnification of a violation by the Provider of the PCI-DSS requirements is reflected and agreed upon under section G-2.1 of the SaaS Agreement.

9. Data Shared with Subcontractors

If Data access is to be provided to a Subcontractor under this DSA, the Receiving Party must include all of the Data constraints, conditions and requirements set forth in this DSA in any such Subcontract or verify that a substantially equivalent term is included. In no event will the existence of the Subcontract operate to release or reduce the liability of the Receiving Party for any breach in the performance of the Receiving Party's responsibilities.

10. Data Breach Notification

In the event of a confirmed breach of City's Data in Provider's possession or control, as data breach is defined by applicable state or federal law, Provider shall report to the Bonney Lake Administrative Services Director under section H-24 of the SaaS Agreement in accordance with applicable law and take such actions as may be necessary to preserve forensic evidence and return SaaS services to standard operability. Additionally, consistent with section B-10 "Notice of Data Breach" of the "Data & Insights SaaS Service Terms of Service" referenced in section H-23 of the SaaS Agreement, the Provider will provide notice, in accordance with applicable Federal or State data breach notification laws. The Receiving Party must also take reasonable actions to mitigate the impact of the data breach and comply with any notification or other requirements imposed on the Receiving Party by applicable law or in order to meet its regulatory obligations.

11. Order of Precedence

In the event of any inconsistency in this DSA and the SaaS Agreement with respect to the subject matter of this DSA, the inconsistency will be resolved in the following order of precedence:

- a. Applicable federal and state statutes, laws, and regulations;
- b. The SaaS Agreement;
- c. Sections of this DSA.

12. Responsibility

Each Party to this DSA will be responsible for the negligent acts or omissions of its own employees, officers, or agents in the performance of this DSA. No Party will be considered the agent of another Party and no Party assumes any responsibility to another Party for the consequences of any act or omission of any person, firm, or corporation not a party to this DSA.

13. Severability

The provisions of this DSA are severable. If any provision of this DSA is held invalid by any court of competent jurisdiction, that invalidity will not affect the other provisions of this DSA and the invalid provision will be considered modified to conform to the existing law.

14. Survival Clauses

The terms and conditions contained in this DSA that by their sense and context are intended to survive the expiration or other termination of this DSA must survive.

Surviving terms include but are not limited to: *Constraints on Use of Data, Security of Data, Data Confidentiality and Non-Disclosure of Data, Data Breach Notification, and Responsibility.*

IN WITNESS WHEREOF, a duly authorized representative of each party has executed this Agreement as of the date(s) set forth below.

Tyler Technologies, Inc.

City of Bonney Lake, Washington

By: _____

By: _____

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

City of Bonney Lake, Washington
City Council Agenda Bill (AB)

Agenda Item Type: Motion	Agenda Bill Number & Ordinance/Resolution/Motion Number: AB24-60 – Motion M24-60	
Department/Division Submitting: Development Services	Presenter: Jason Sullivan, Interim Public Services Director	City Strategic Goal Category: DON'T FILL OUT YET

Agenda Subject: Community Development Element – Comprehensive Plan Update.

Full Title/Motion: A Motion Of The City Council Of The City Of Bonney Lake, Pierce County, Washington, Directing Staff To Submit The August 2024 Version Of The Community Development Element To The Department Of Commerce And To Include It In The Final Version Of The Comprehensive Plan.

Administrative Recommendation: None.

Short Background Summary (Use a memo to write a full history): Staff Has Completed Drafting Updates To The Community Development Element To Ensure Consistency With Washington State Law, Multi-County Planning Policies (MPP), Countywide Planning Policies (CPP). The Attached Briefing Memorandum Provides Additional Details. The Attached Consistency Matrix Provides A Crosswalk Between Existing And Proposed Policy And Identifies The State Law, MPP, Or CPP Necessitating The Policy.

Attachments: Briefing Memorandum, Final Draft Community Development Element (Clean), Housing Equity Report, Land Capacity Analysis, Growth Alternatives Memo, RCW / MPP / CPP Consistency Matrix, PSRC Comment Letter.

BUDGET INFORMATION

Budgeted Amount	Current Balance	Expenditure Amount Needed	Budgeted Balance Difference
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Budget Explanation:

COMMITTEE, BOARD & COMMISSION REVIEW

Public Hearing Date:	Name Of Committee/Commission Public Hearing Was Done At:
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Date & Name Of Committee/ Commission Meeting	Return To Committee/ Commission/Board	Council Workshop Discussion	Consent Agenda	Council Full Issues	Chair's Signature For Approval Of Next Steps
Date: Name:	☐ Yes	☐ Yes	☐ Yes	☐ Yes	
Date: Name:	☐ Yes	☐ Yes	☐ Yes	☐ Yes	
Date: Name:	☐ Yes	☐ Yes	☐ Yes	☐ Yes	
Date: Name:	☐ Yes	☐ Yes	☐ Yes	☐ Yes	

Hearing Examiner Review:

COUNCIL ACTION

Workshop Date(s): 8/16/2022, 5/7/2024 4/16/2023	Public Hearing Date(s):
Meeting Date(s): 4/23/2024, 5/14/2024, 9/10/2024	Tabled To:

APPROVALS

Department Director: Jason Sullivan	Mayor: Terry Carter	Date Reviewed By City Attorney (if applicable):
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Public Services Briefing Memorandum

Meeting Date: September 10, 2024

Memo Date: August 30, 2024

Staff Contact: Jason Sullivan – Interim Public Services Director

Prepared By: Lauren Balisky – Interim Planning Manager

Action Type: Discussion

Agenda Title: Periodic Update – Final Draft Community Development Element

PURPOSE:

The purpose of this item is to brief the City Council on the final draft Community Development Element.

EXECUTIVE SUMMARY:

The City completed a final draft Community Development Element to serve the projected housing, population, and employment targets for the time periods from 2020-2044 and 2020-2049¹, based on the “Bend the Trend” growth alternative recommended by Planning Commission and identified as the preferred growth alternative by City Council (Motion No. M24-33). This growth alternative focuses growth in specific areas of the Midtown and Downtown Centers and expands the areas zoned R-1 to expand homeownership opportunities, address the identified housing deficit, comply with the minimum requirements of the Growth Management Act (GMA), and be more consistent with Puget Sound Regional Council’s (PSRC’s) *VISION 2050*’s goal of reducing the City’s overall population growth rate in the future.

DISCUSSION:

Background

Washington's Growth Management Act (GMA) adopted as Chapter 36.70A RCW mandates that the City adopt and regularly update a comprehensive plan. The City’s comprehensive plan is intended to serve as the policy framework to effectively manage growth and development within

¹ The 2020-2044 growth targets adopted on July 7, 2023 under Pierce County Ordinance No. 2023-22s, the City’s compliance with the GMA and PSRC certification is based on the 2044 targets. The 2020-2049 growth targets extend the 2044 target based on projected growth rate and were simply done to coincide with the City’s centennial and overall planning horizon.

the City, protect the property rights of the City’s residents, facilitate economic development, and guide land use decisions and infrastructure investments.

One of the critical elements is a requirement to demonstrate that there is sufficient development capacity within the City to accommodate future population, housing, and employment growth consistent with the GMA, the adopted multicounty planning policies (MPPs) established as part of the Puget Sound Regional Council’s *VISION 2050*, and the adopted countywide planning policies (CPPs) established by Pierce County.

Summary of Changes

The following is a summary of the major changes between the 2015 Comprehensive Plan and the proposed final draft Community Development Element of the 2024 Comprehensive Plan.

This final draft is provided as a clean version due to the scope of required changes and changes made to improve sequence and readability of the sections. A track changes version is available upon request.

1. Introduction
 - Expanded regulatory context and add high-level summary of laws enacted since the 2015 update.
 - Converted “Organization” to its own, bulleted section for readability.
2. Population Profile
 - Moved from Section 3, Existing Conditions
 - Updated with current data.
 - Data that was specific to housing, economic development, or land use, rather than the general community, were relocated to those sections.
3. Housing
 - Moved from Section 8.
 - Completely rewritten to address change to mandatory housing element requirements in State law, consistent with state guidance
 - 3.1 Planning for Housing
 - Section added to explain regulatory requirements at the state, regional, and county level that form the basis of the updated subelement.
 - 3.2 Housing Profile
 - Housing profile updated with current data for the city as a whole (profiles for socioeconomic subgroups is available in the Housing Equity Report).
 - Data in this section, along with the Land Capacity Analysis, form the basis of the identified housing need.

- Added summary of barriers to housing construction.
 - Added findings from Housing Action Plan.
 - Added findings from Housing Equity Report.
- 3.3 Identified Housing Needs
- Added evaluation need at each income level, as required by State law, against Land Capacity Analysis and Alternative Two: “Bend the Trend” growth alternative.
 - Added analysis of emergency housing capacity and accessory dwelling unit capacity, as required by State law.
- 3.4 Housing Goals and Policies
- Updated to address findings from Housing subelement and current conditions.
4. Economic Vitality
- Moved from separate economic vitality element.
- 4.1 Planning for Economic Vitality
- Added section to explain State law, MPPs, and CPPs that impact this subelement. This subelement is not currently mandatory, since it has never been funded by the state, however it builds on work previously completed by Bonney Lake.
- 4.2 Economic Profile
- Updated to reflect current conditions and add a section on access to childcare.
- 4.3 Employment Growth
- Moved from Section 5.2.
 - Updated to match current targets and Land Capacity Analysis.
- 4.4 Business Climate
- Minor updates for clarity.
- 4.5 Infrastructure Development
- Minor updates for clarity
- 4.6 Economic Vitality Goals and Policies
- Minor updates for clarity and to reflect current conditions.
 - Added a policy (CD-EV-4.1) on access to childcare.
5. Property Rights
- Moved from Section 9.
 - Added subsections “About Takings” and “Property Rights Goals and Policies” for clarity and consistency with other sections.
 - Updated guidance from Office of the Attorney General.
 - Updated policies consistent with State law.

6. Land Use

- Moved from Section 6 to the end to reflect that land use is determined based on analysis of housing and economic development.

6.1 Planning for Land Use

- Added section to explain State law, MPPs, and CPPs that impact this subelement.

6.2 Land Use Profile

- Updated to reflect conditions consistent with the timing of the data used for the Land Capacity Analysis.

6.3 Existing Development Patterns

- Moved from Section 7.
- Updated to reflect current conditions.

6.4 Potential Annexation Areas

- Relocated from Section 4, updated to reflect current Potential Annexation Areas.

6.5 Future Land Use Map Overview

- Moved from Section 6.1.
- Minor updates for clarity.

6.6 Future Land Use Designations

- Moved from Section 6.3.
- Updated to reflect the Alternative Two: “Bend the Trend” growth strategy.

6.7 Future Land Use Map

- Moved from Section 6.2.
- Updated to reflect the Alternative Two: “Bend the Trend” growth strategy.

6.8 Future Land Use Goals and Policies

- Consolidated policies from Section 4, Potential Annexation Areas, and Section 7, Development Patterns.
- Minor updates for clarity or to reflect current conditions.
- Policies for siting essential public facilities (CD-LU-6.12), preserving historic and cultural resources (CD-LU-7.10), and enhancing the health of residents (CD-LU-9 and policies) added to comply with CPPs and changes to State law.

See the attached Consistency Matrix for a complete comparison of existing policies, proposed policies, applicable State law, MPPs, CPPs, and, if applicable, additional rationale for a change. Below is an example of the matrix.

2024 Proposed Goals and Policies - Envision Bonney Lake		2015 Existing Goals and Policies - Bonney Lake 2035		Requirement			Notes
Goal/Policy #	Goal/Policy	Goal/Policy #	Goal/Policy	MPP	CPP	RCW/WAC	
Goal CD-LU-1	Develop dynamic and vibrant centers accommodating housing, shopping, services, civic activities, entertainment facilities, and recreational opportunities in a manner that harmoniously blends the natural and built environments.	Goal CD-2	Develop dynamic and vibrant centers accommodating housing, shopping, services, civic activities, entertainment facilities, and recreational opportunities in a manner that harmoniously blends the natural and built environments.	Regional Growth Strategies Goal			

External Review

A draft of the housing sub-element was provided to the Washington State Department of Commerce (Commerce) on July 3, 2024, with a draft Periodic Update Checklist and a draft Expanded Housing Checklist. Staff met with Commerce on August 7, 2024. Commerce did not have comments on the sub-element.

A draft of the housing sub-element was provided to Puget Sound Regional Council (PSRC) on July 5, 2024, with a draft PSRC Consistency Checklist. PSRC had minor comments to clarify the sub-element (see attached).

The full draft Community Development Element was provided to the Planning Commission for review at its August 28, 2024, meeting. The Planning Commission had no additional comments or changes.

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Community Development Element



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1. INTRODUCTION

It is the intent of the Planning Commission and Town Council to develop a 'New Town' within the Greater Puget Sound Region. This town is to be well organized, have adequate play space for children, have school facilities within walking distance of small children, shopping centers at convenient places, separate pedestrian, and vehicular traffic, and provide those amenities of life which make life well worth living within the Town of Bonney Lake.

- *Plan for Bonney Lake, Washington (1964)*

The Community Development Element establishes the policy framework that will shape the physical development of the City of Bonney Lake and fulfills the requirements of Revised Code of Washington (RCW) Sections 36.70A.070(1) and 36.70A.070(2) that local comprehensive plans address land use and housing. The City has chosen to combine the required land use and housing elements with the optional economic development element into one element due to the significant interrelatedness of these issues, and the role these issues play in improving the health of the residents of Bonney Lake. Specific characteristics of the built environment that have the potential to enhance community's social capital and create a corresponding improvement in the health of the community related to land use and housing policies include encouraging mixed land uses, creating meeting destinations such as parks or other public spaces, providing neighborhood walkability, and ensuring the upkeep of the community¹.

The Community Development Element is also crucial to guiding the City toward being a sustainable suburb with a land use pattern that consumes less energy, is less dependent on automobiles, supports local businesses, promotes public health, and is inclusive of persons of all ages, income levels, and physical capabilities. The Element has been carefully integrated with the Community Mobility Element to promote a future development pattern that reflects the opportunities and constraints of the transportation system.

1.1 REGULATORY CONTEXT

This Community Development Element was developed in compliance with the Washington State Growth Management Act (GMA), a series of state statutes that require fast-growing cities and counties to adequately plan for and manage population growth.

¹ Eicher C. and Kawachi I. (2011) Social Capital and Community Design. *Making Healthy Places – Designing and Building for Health, Well-being, and Sustainability*. Island Press. Washington D.C. p. 117 – 127.

While all elements of the comprehensive plan have equal weight under the GMA (Chapter 36.70A RCW), nine of the fifteen goals of the GMA specifically pertain to land use, housing, and economic vitality in Bonney Lake:

- **Urban Growth:** Encourage development in urban areas where adequate public facilities and services exist or can be provided in an efficient manner.
- **Reduce Sprawl:** Reduce the inappropriate conversion of undeveloped land into sprawling, low-density development.
- **Housing:** Encourage the availability of affordable housing to all economic segments of the population of this state, promote a variety of residential densities and housing types, and encourage preservation of existing housing stock.
- **Economic Development:** Encourage economic development throughout the state that is consistent with adopted comprehensive plans, promote economic opportunity for all citizens of this state, especially for unemployed and for disadvantaged persons, promote the retention and expansion of existing businesses and recruitment of new businesses, recognize regional differences impacting economic development opportunities, and encourage growth in areas experiencing insufficient economic growth, all within the capacities of the state's natural resources, public services, and public facilities.
- **Property Rights:** Private property shall not be taken for public use without just compensation having been made. The property rights of landowners shall be protected from arbitrary and discriminatory actions.
- **Permits:** Applications for both state and local government permits should be processed in a timely and fair manner to ensure predictability.
- **Open Space and Recreation:** Encourage the retention of open space and development of recreational opportunities, conserve fish and wildlife habitat, increase access to natural resource lands and water, and develop parks.
- **Citizen Participation and Coordination:** Encourage the involvement of citizens in the planning process and ensure coordination between communities and jurisdictions to reconcile conflicts.
- **Public Facilities and Services:** Ensure that those public facilities and services necessary to support development shall be adequate to serve the development at the time the development is available for occupancy and use without decreasing current service levels below locally established minimum standards.

Since the last major update to this plan, a number of laws have been enacted by the Washington State Legislature that impact the development and implementation of this Community Development Element (see **Exhibit 1**).

Exhibit 1: Summary of Relevant Washington State Laws Enacted Since 2015

	Bill No.	Summary
2019-20 Session	SHB 1377	Cities must allow an increased density bonus for affordable housing developments located on property owned or controlled by a religious organization.
	E2SHB 1923	Encourages cities to adopt at least two strategies (such as ADUs, middle housing, and increased density) to increase residential capacity.
	ESSB 6617	Prohibits parking requirements for ADUs within 0.25 miles of a major transit stop unless in an area with a lack of access to street parking capacity.
2021-22 Session	E2SHB 1220	Requires cities to plan for and accommodate affordable housing at specific income levels and permanent supportive housing and emergency shelters in certain zones.
	ESSB 5593	Allows counties to expand UGAs under certain circumstances.
	SSB 5818	Exempts from SEPA appeal the adoption regulations that increase housing capacity and affordability. Changes categorical exemptions for some residential uses.
2023-24 Session	ESHB 1042	Provides flexibility for conversion of nonresidential buildings to residential units – exempting them from bulk and development, design, and parking standards.
	ESHB 1293	Requires clear and objective design review standards for the exterior design of new development. Encourages expedited review for affordable housing.
	SHB 1326	Allows cities to waive utility connection fees for properties owned or developed by organizations that provide affordable or emergency/transitional housing.
	EHB 1337	Removes barriers to construction of ADUs such as design/aesthetics requirements, owner-occupancy restrictions, and size/height limits under a certain threshold.
	HB 1695	Defines affordable housing for purposes of using surplus public property.
	E2SSB 5258	Requires impact fees to be proportional and reflect unit size and number of bedrooms (or trips generated). Requires cities to have a unit lot subdivision process.
	SB 5290	Provides local governments with new default permit processing time frames and requires permitting fee refunds if the time frames are missed.

Source: Washington State Department of Commerce, Growth Management Act Amendments 1995-2023. Available online at: <https://deptofcommerce.box.com/s/41vk2hbhsder8movy8kmyljbwac6v7ik>

In addition to the GMA requirements, this Element must also be consistent with adopted Multi-County Planning Policies (MPPs) and County-Wide Planning Policies (CPPs).

The Puget Sound Regional Council (PSRC) adopted MPPs in VISION 2050². These policies encourage local jurisdictions to adopt coordinated strategies, policies, and actions to ensure the region's needs are met. Applicable MPPs are provided in the **Housing**, **Economic Vitality**, and **Land Use** sections of this Element.

² Available online at: <https://www.psrc.org/planning-2050/vision-2050>

Pierce County adopted updated CPPs in 2022³ that further refine how municipal comprehensive plans are drafted and adopted. Applicable CPPs are provided in the Housing, Economic Development, and Land Use sections of this Element.

1.2 ORGANIZATION

This Element is divided into the following sections:

- **Section 2: Population Profile** provides an overview of existing demographic conditions at a citywide level.
- **Section 3: Housing** evaluates existing housing and identifies future housing needs based on demographic trends, with special attention paid to providing housing that is affordable to all income levels.
- **Section 4: Economic Vitality** focuses on economic vitality within Bonney Lake and discusses the balance between managing new growth within Bonney Lake while maintaining the city's existing businesses, and sets the standard for long-term economic sustainability.
- **Section 5: Property Rights** addresses the protection of property rights, which is one of the goals of the Growth Management Act.
- **Section 6: Land Use** examines existing development patterns, identifies the city's official potential annexation areas within the current Pierce County Urban Growth Area (UGA), and presents the Future Land Use Map and land use designations to show the land use intent over the planning horizon of this Comprehensive Plan.

³ Available online at:

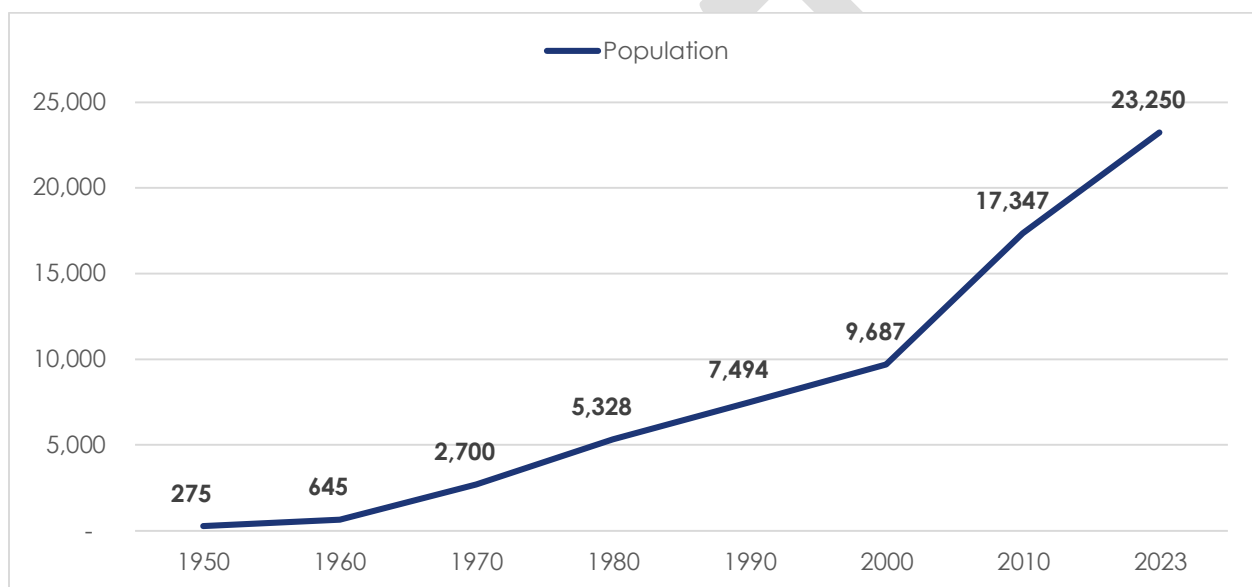
https://online.co.pierce.wa.us/cfapps/council/iview/proposal.cfm?proposal_num=2022-29

2. POPULATION PROFILE

2.1 POPULATION GROWTH

The total population within the incorporated boundaries of Bonney Lake as of June 1, 2023, was 23,250 according to the Washington State Office of Financial Management (OFM), making Bonney Lake the fifth-most populous city in Pierce County. The City has experienced rapid population growth over the last 75 years due to extensive residential development and annexations (see **Exhibit**).

Exhibit 2: Population Growth, Bonney Lake, 1950 – 2023

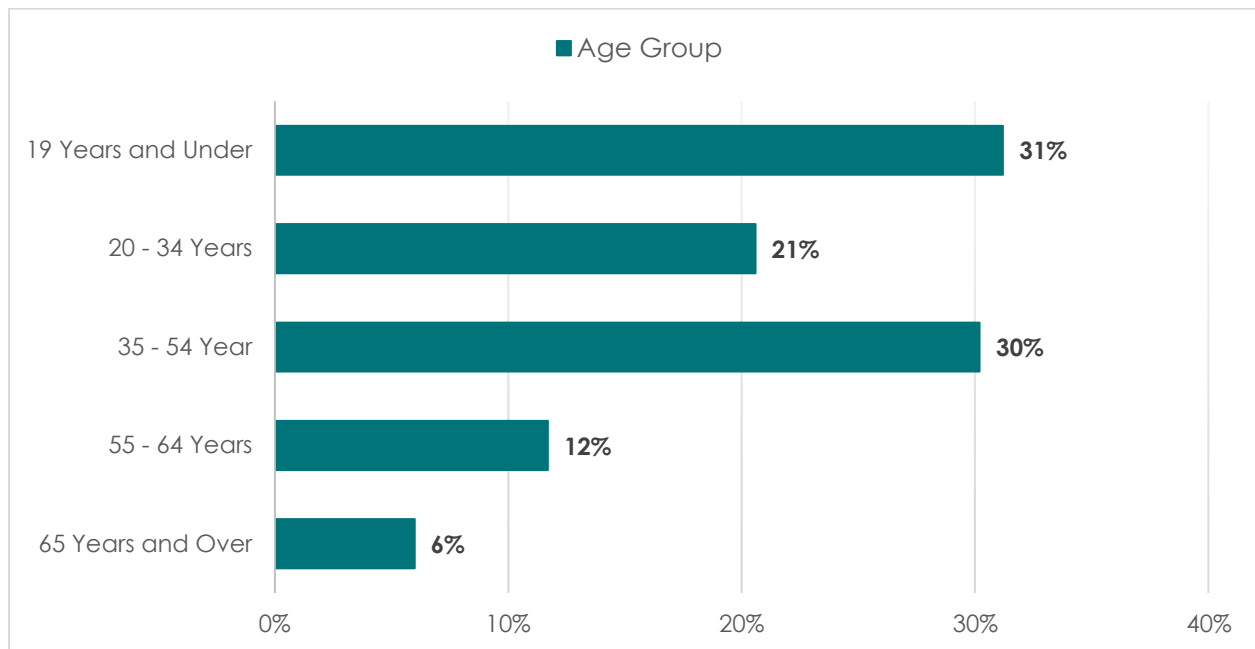


Source: Washington State Office of Financial Management (OFM)

Bonney Lake has had an annual average growth rate of 2.56% over the 20-year period from 2000 to 2020, excluding growth due to annexations. From 2000 to 2010, the average annual growth rate was 3.63% and from 2010 to 2020, the average annual growth rate slowed to 1.92%. The adopted vision 2050 growth alternative is to “bend the trend” and slow the growth rate. Growth has been slowing and this trend is expected to continue.

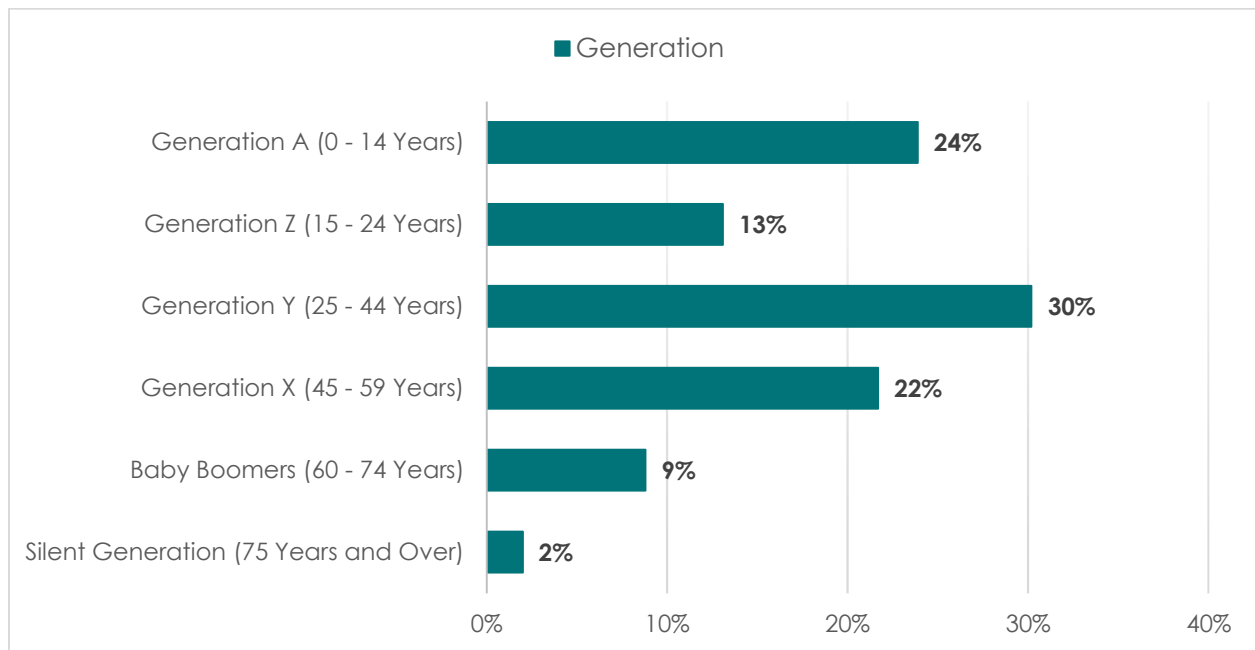
2.2 AGE

The population of Bonney Lake is predominately younger with over three quarters of the City's population under the age of 55. The largest segment of Bonney Lake's population is 19 years old or younger, a group that represents 31% of the City's population.

Exhibit 3: Age of Population, Bonney Lake, 2021

Source: American Community Survey (ACS) Table DP05, 2021

While understanding the ages of the population within a community is important, the typical age groupings can span multiple generational cohorts. For example, the age grouping of 35 to 54 spans two generational cohorts: Generation X and Generation Y (also known as the Millennial Generation). Understanding the generational spilt of a community is crucial, as each cohort approaches housing and other land use issues with different attitudes and expectations. Three generational cohorts represent over 75% of the population in Bonney Lake: Generation X, the Millennial Generation, and Generation A (see **Exhibit 4**).

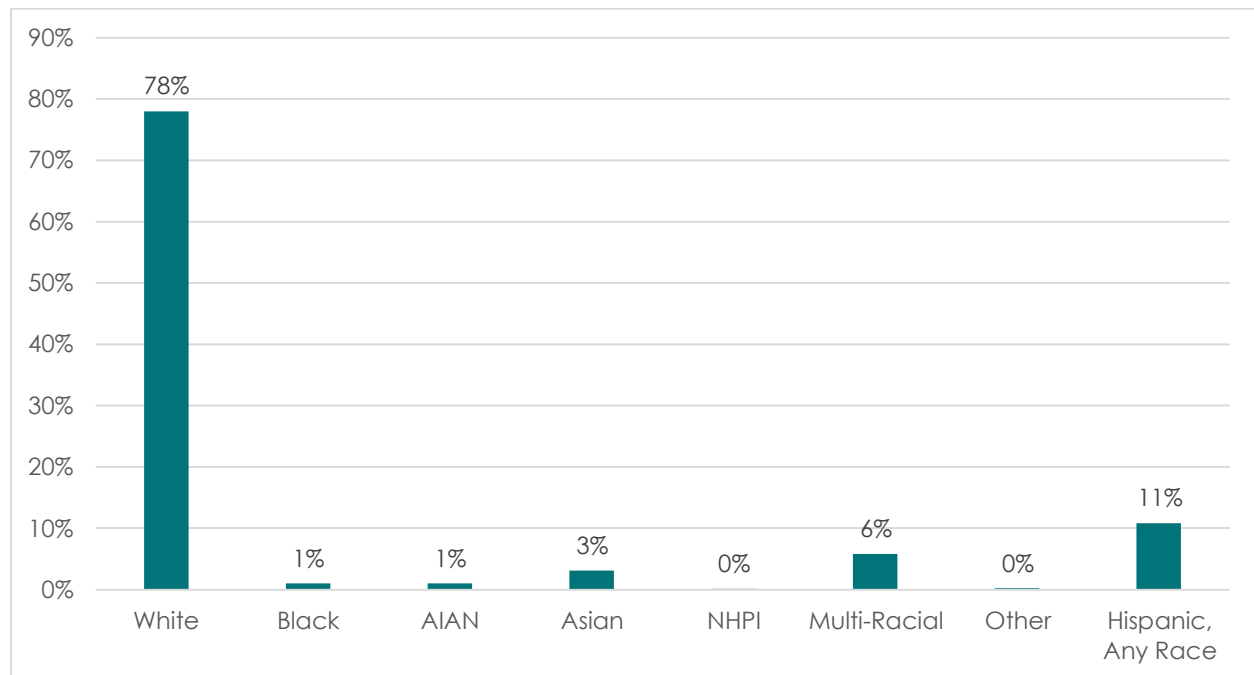
Exhibit 4: Generational Makeup, Bonney Lake, 2021

Source: ACS Table DP05, 2021

2.3 RACE AND ETHNICITY

The City of Bonney Lake is becoming increasingly diverse, with greater shares of residents who identify as Black, Hispanic, and American Indian or Alaska Native since 2011 (see **Exhibit 5**). For additional information on race and ethnicity in Bonney Lake, see the Housing Equity Report (HER), prepared in compliance with Engrossed Second Substitute House Bill (E2SHB) 1220⁹ and Revised Code of Washington (RCW) 36.70A.020(2). The HER is adopted by reference in **Appendix TBD**.

⁹ Available online at: <https://lawfilesexternal.wa.gov/biennium/2021-22/Pdf/Bills/Session%20Laws/House/1220-S2.SL.pdf?q=20240516102013>

Exhibit 5: Race and Ethnicity of Residents, Bonney Lake, 2021

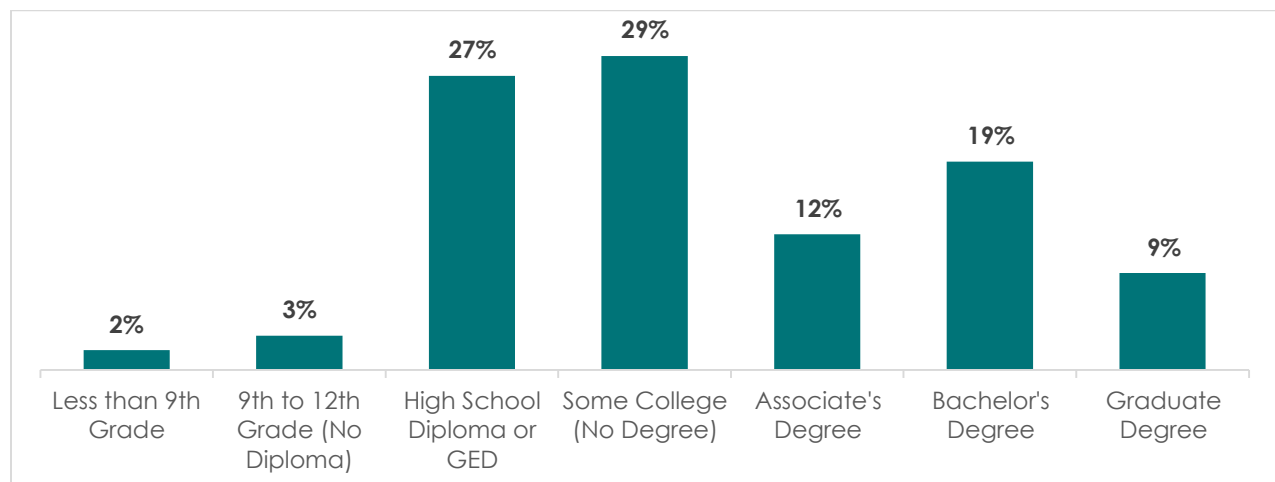
Source: ACS Table DP05, 2021

AIAN: American Indian and Alaskan Native

NHPI: Native Hawaiian and Pacific Islander

2.4 EDUCATIONAL ATTAINMENT

In Bonney Lake, almost all residents (95%) have a high school diploma or equivalent, and 40% have obtained a college degree (see **Exhibit 6**).

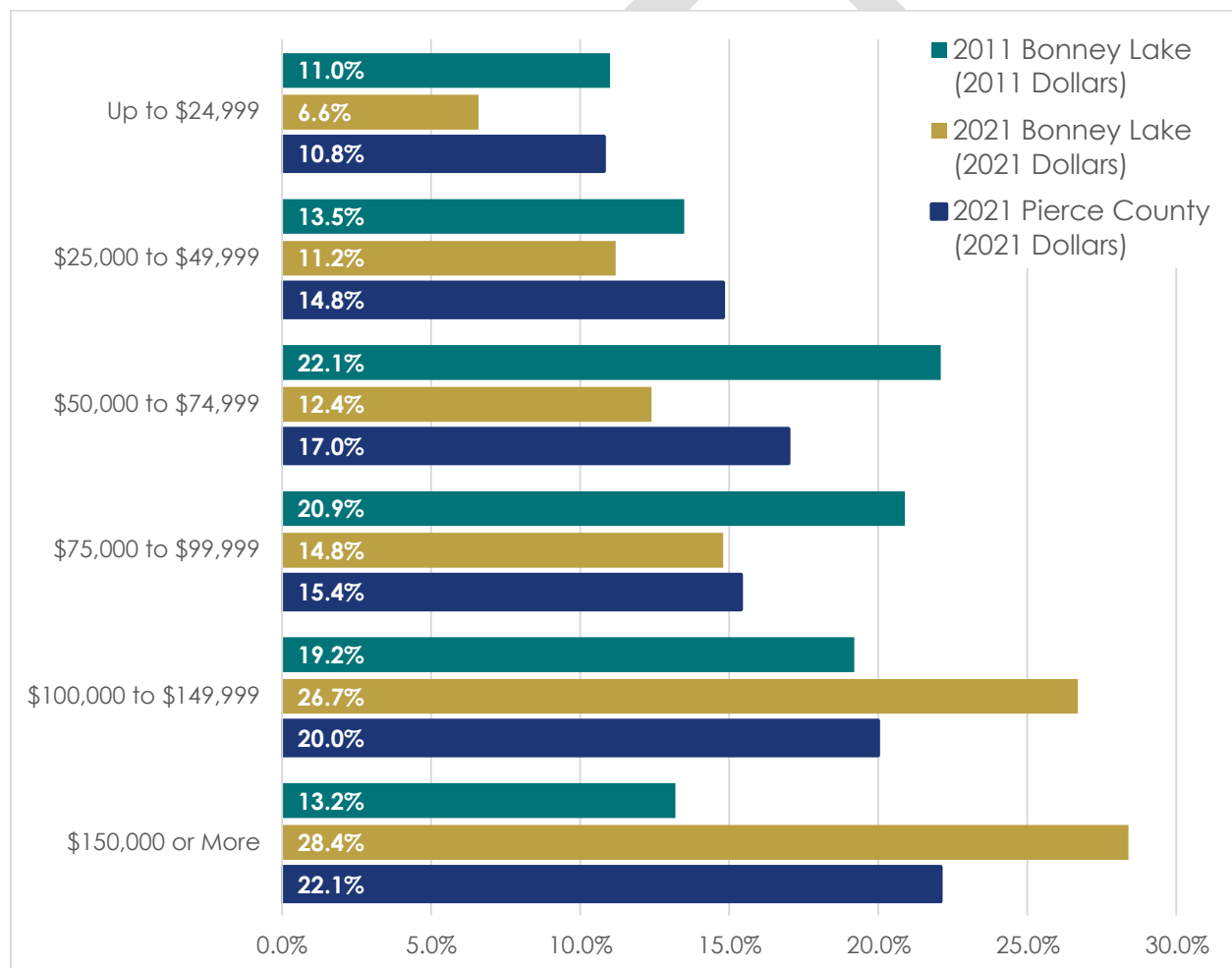
Exhibit 6: Educational Attainment, Bonney Lake, 2021

Source: ACS Table DP02, 2021

2.5 INCOME

In 2021, Bonney Lake had a household median income of \$108,705, which is higher than the median household income for Pierce County of \$85,866¹¹. Over 82% of the households in Bonney Lake making more than \$50,000 (see **Exhibit 7**). Between 2011 and 2021, there was an overall increase in the use of public cash assistance¹² and an average of 4.5% of Bonney Lake residents used some form of this assistance each year. Use of Social Security Income and Supplemental Security Income also increased since 2011 (see **Exhibit 8**).

Exhibit 7: Annual Median Household Income, Bonney Lake, 2011 and 2021, and Pierce County, 2021



Source: ACS Table S1901, Bonney Lake and Pierce County, 2011, 2021

¹¹ Source: ACS Table S1901, Bonney Lake and Pierce County, 2021

¹² Public cash assistance includes food stamps, Supplemental Nutrition Assistance Program (SNAP), etc.

Exhibit 8: Supplemental Income for Select Years, Bonney Lake, 2011 – 2021

Income Type	2011	2014	2017	2021	2011-21 Average
Social Security Income	19.5%	19.7%	21.5%	25.1%	23.1%
Supplemental Security Income	1.8%	1.9%	5.1%	3.4%	3.7%
Public Cash Assistance or Food Stamps / SNAP	2.2%	1.9%	8.3%	5.6%	4.5%

Source: ACS Table S1902, 2011- 2021

Approximately 5.1% of Bonney Lake households live below 100% of the federal poverty level as compared to the Pierce County average of 8.0%¹³. The federal poverty level is a sliding scale, based on the total annual income of the household and the number of individuals living in the household (see **Exhibit 9**).

Exhibit 9: Federal Poverty Guidelines for the 48 Contiguous States and the District of Columbia, 2021

Persons in Family / Household	1	2	3	4	5	6	7	8
Poverty Guideline	\$12,880	\$17,420	\$21,960	\$26,500	\$31,040	\$35,580	\$40,120	\$44,660

Source: Office of the Assistant Secretary for Planning and Evaluation

Note: For families/households with more than 8 persons, add \$4,540 for each additional person.

Available online at: <https://aspe.hhs.gov/2021-poverty-guidelines>

2.6 COMMUNITY HEALTH

Tacoma-Pierce County Health Department (TPCHD) is responsible for tracking community health indicators, including behavioral health, life expectancy, chronic disease, and violence prevention. Planning for health and human safety means identifying the specific needs and factors that influence the health of a community.

In 2019, TPCHD released the Community Health Assessment (CHA), which evaluated Pierce County against Washington as a whole to inform future strategic priorities of TPCHD. The report also contains data broken down by demographic data such as age and race. Indicators where Pierce County performed worse than Washington State overall are shown in **Exhibit 10**. Cities can play a role in improving these indicators through programs, policies, and local development regulations.

¹³ Source: ACS Table C17002, Bonney Lake and Pierce County, 2021

Exhibit 10: Select Health Indicators, Pierce County and Washington State Overall, 2019

Indicator	Pierce County Rate	Washington State Rate
Cancer – Breast	178.0 per 100,000	170.4 per 100,000
Cancer – Lung	71.3 per 100,000	57.5 per 100,000
Cigarette Use	18.60%	15.40%
Depression – Adults	23.90%	22.00%
Did Not Visit Doctor Due to Cost	15.10%	13.30%
Injury Hospitalizations – Intentional	97.8 per 100,000	71.8 per 100,000
Injury Hospitalizations – Unintentional	668.5 per 100,000	556.3 per 100,000
Obesity – Adults	29.80%	27.30%
Serious Mental Illness	5.00%	3.80%
Suicide Prevention Education Rate	43.30%	54.30%
Suicide Rate	17.7 per 100,000	14.9 per 100,000

Source: Adapted from Community Health Assessment, 2019. Indicators listed items where the overall Pierce County population is noted as a value significantly different than Washington overall.

Available online at: <https://tpchd.org/wp-content/uploads/2023/12/CHA-2019.pdf>

TPCHD then developed the 2020 Community Health Improvement Plan (CHIP)¹⁷ based on the results of the CHA. Findings of the CHA and goals identified in the CHIP that can be supported by Bonney Lake include:

- Access to affordable, healthy food that is available close to work and home;
- Safe, reliable, available and affordable housing;
- Availability of multi-modal transportation options to ensure residents can access places where they live, learn, work, and shop;
- Access to health care, especially mental health and substance abuse services;
- Provide equitable access to community spaces, such as parks, community centers, and safe spaces for teens; and
- Offer opportunities to celebrate local diversity by sharing community traditions and cultural knowledge.

¹⁷ Available online at: <https://tpchd.org/healthy-places/public-health-data/community-health-improvement-plan/>

3. HOUSING

The purpose of a Housing Sub-Element is to provide goals and policies that guide the range of housing choices available to existing and future residents of Bonney Lake. The mix of housing goals and policies in this section are intended to promote options available to all economic segments and life stages of the community, as required by RCW 36.70A.070(2). These goals and policies are based on the types of existing housing in the City and identify current and future housing needs.

This Housing Sub-Element is related to other elements of the Comprehensive Plan. Later portions of this Community Development Element identify land use densities, land use compatibilities, and growth estimates that indicate where and how much land is needed to accommodate the allocated housing needs. The Mobility Element and the Community Facilities and Services Element indicate where and how public facilities and utilities will be provided to support housing throughout the City.

3.1 PLANNING FOR HOUSING

Growth Management Act

In 2021, the Washington State Legislature passed the first major update to the housing goal (RCW 36.70A.020(4)) and mandatory housing element requirements (RCW 36.70A.070(2) since 1990 ¹⁸, which expanded and clarified the minimum requirements associated with this mandatory element of the comprehensive plan. At a minimum, this Sub-Element must contain:

- An inventory and analysis of existing and projected housing needs, including:
 - Units for moderate, low, very low, and extremely low-income households; and
 - Adequate emergency housing, emergency shelters, and permanent supportive housing.
- A statement of goals, policies, and objectives for the preservation, improvement, and development of housing, including low- and moderate-density housing options.
- Identification of sufficient land capacity for housing.
- Adequate provisions for existing and projected needs of all economic segments of the community, including consideration of housing in relation to the location of

¹⁸ Engrossed Second Substitute House Bill (E2SHB) 1220). Available online at: <https://lawfilesexternal.wa.gov/biennium/2021-22/Pdf/Bills/Session%20Laws/House/1220-S2.SL.pdf>

employment, the role of accessory dwelling units, and documenting programs and actions needed to achieve housing availability.

- Documentation of any local policies, plans, and actions that result in racially disparate impacts, displacement, or exclusion in housing, such as zoning, disinvestment, or infrastructure availability. The results must be paired with policies and regulations to address and begin to undo such impacts.
- Policies to prevent displacement and to preserve historical and cultural communities as well as low, very low, extremely low, and moderate-income housing.

As described in **Section 1.1: Regulatory Context**, this Sub-Element must also be consistent with adopted multi-county planning policies (MPPs) and county-wide planning policies (CPPs).

Multi-County Planning Policies (MPPs)

PSRC adopted MPPs in VISION 2050 that encourage local jurisdictions to coordinate strategies, policies, and actions to ensure the region's housing needs are met. This Housing Sub-Element must be consistent with VISION 2050 in the following areas:

- **Affordability:** Ensuring a range of housing choices and supply for all income levels that mirrors local community need.
- **Focusing Housing Near Transit Options:** Promoting affordable housing within walking distance from transit stations and in growth centers to ensure all residents the opportunity to live in accessible and connected communities.
- **Displacement and Community Stability:** Minimizing forced physical or economic relocation to improve the cohesion and stability of a community and the well-being of residents and businesses.
- **Jobs-Housing Balance:** Providing housing options with nearby jobs, to reduce the length of commute travel and number of vehicle trips.

County-Wide Planning Policies (CPPs)

Pierce County adopted updated CPPs in 2022. This Housing Sub-Element is required to be coordinated and consistent with the CPPs in the following areas:

- **Affordability:** Ensuring housing affordable for all economic segments of the population, with special attention paid to the historically underserved.
- **Countywide Housing Affordability Program:** Coordination amongst jurisdictions through the South Sound Housing Affordability Partners (SSHA³P) to coordinate the development of affordable housing.

- **Monitoring:** Each jurisdiction must assess its success in meeting the housing needs for its population allocation.
- **Encourage Homeownership:** Support opportunities for low-income, moderate-income, and middle-income families and individuals in access to homeownership opportunities.
- **Displacement:** Use a range of strategies to prevent and minimize, the cultural and physical displacement and mitigate its impacts to the extent feasible.

3.2 HOUSING PROFILE

As of 2021, there were an estimated 7,920 households living in Bonney Lake^{19, 20} and 8,164 available housing units. Analyzing the composition of households provides insight on the housing needs of the community. Housing comes in many forms, such as detached houses, apartments, townhouses, accessory dwelling units (ADUs), and mobile and manufactured homes. The existing housing inventory reflects historical housing patterns and the evolving needs of Bonney Lake.

Housing Units

Exhibit 11: Net Change in Housing by Type, Bonney Lake, 2011 – 2021

Housing Type	2011	2021	Change in Housing Units	Annual Avg. Growth Rate	% of Total Units
Single-Family Detached	5,182	6,525	+1,343	2.33%	79.9%
Townhouses / Multi-Family (2-4 Units)	420	666	+246	4.72%	8.2%
Multi-Family (5+ Units)	221	448	+227	7.32%	5.5%
Mobile Homes / Other	415	525	+110	2.38%	6.4%
Total	6,238	8,164	+1,926	2.73%	100.0%

Source: ACS Table B25024, 2011, 2021

Exhibit 11 shows that the City's existing housing is primarily detached housing units, which make up approximately 80% of the City's total housing units. Between 2011 and 2021, over 1,900 new housing units were added to the City, either via new construction or annexation of properties with existing housing units. This inventory includes 21 adult family homes, a senior living facility with 123 units, and 34 accessory dwelling units (ADUs).

¹⁹ Source: American Community Survey (ACS) Table DP04, 2021

²⁰ A **household** is a group of people who live in one (1) dwelling unit. Households can have one (1) or more members and can be families or unrelated people living together.

Almost 50% of Bonney Lake's existing housing has been constructed since 2000, and approximately 77% of the available housing is less than 50 years old (see **Exhibit 12**). The age of the existing housing inventory correlates with the growth in population for the City, with majority of housing being built between 2000-2009, when the City saw its largest population increase to date. Of the 8,164 housing units, approximately 3.0% were vacant in 2021, well above the home vacancy rate in Washington of 0.7%²¹ that same year.

Exhibit 12: Age of Housing Stock in Bonney Lake, 2021

Year Built	Number of Units	% of Housing	Approximate Age of Housing
Built 2020 to 2021	79	1%	4 Years
Built 2000 to 2019	3,716	47%	5 – 24 Years
Built 1999 to 1980	2,300	29%	25 – 44 Years
Built 1979 to 1960	1,559	20%	45 – 64 Years
Built 1959 to 1940	122	2%	65 – 84 Years
Built 1939 or Earlier	144	2%	85 Years or More

Source: ACS Table B25127, 2021

Households

In 2021, 81% of housing was owner-occupied and 19% was renter-occupied, which is a significantly higher owner-occupancy rate than Pierce County overall (65%)²². A housing unit is considered owner-occupied when an owner or co-owner lives in the unit, even if individuals renting or leasing also live in the unit. All other units are referred to as renter-occupied²³.

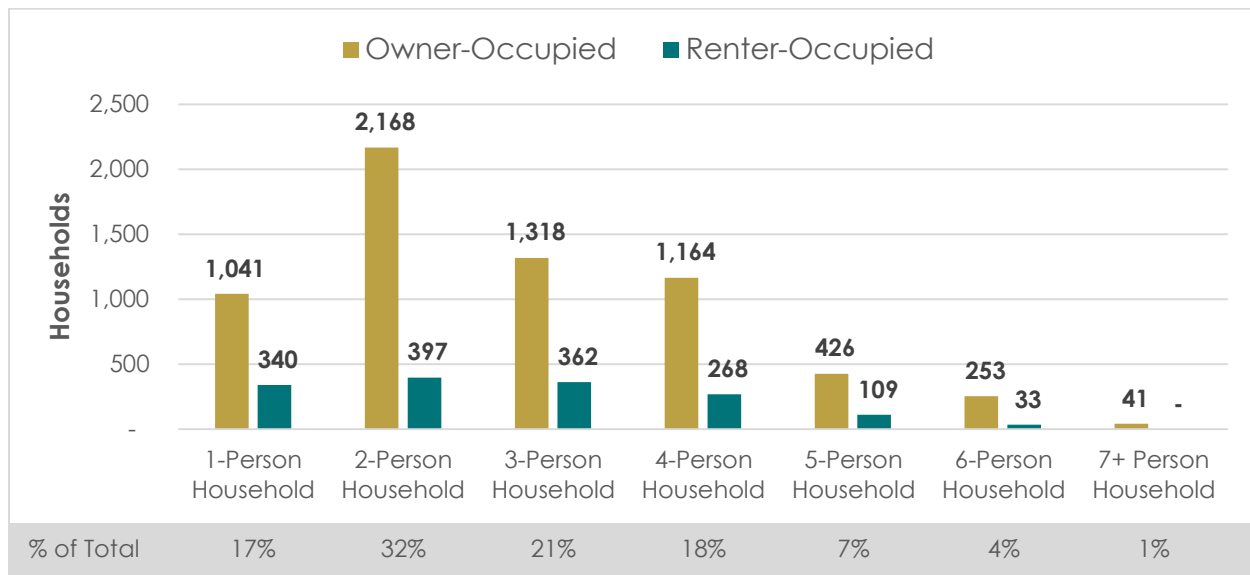
The City's average household size in 2021 was 2.80, higher than the Pierce County average of 2.61 and the Washington average of 2.51²⁴. This is slightly lower than the average household size in 2011 of 2.86, meaning households appear to be getting smaller. As of 2021, just under 50% of the City's residents lived alone or in two (2) person households (see **Exhibit 13**).

²¹ A natural vacancy rate is the rate that prevails when markets are in balance, meaning that prices are not rising nor falling faster than income or construction costs.

²² Source: ACS Table S2502, Bonney Lake, 2021

²³ U.S. Census Bureau Glossary, available online at: <https://www.census.gov/glossary/>

²⁴ Source: ACS Table DP04, Bonney Lake, Pierce County and Washington, 2021

Exhibit 13: Household Size by Owner- and Renter-Occupancy, Bonney Lake, 2021

Source: ACS Table B25009, 2021

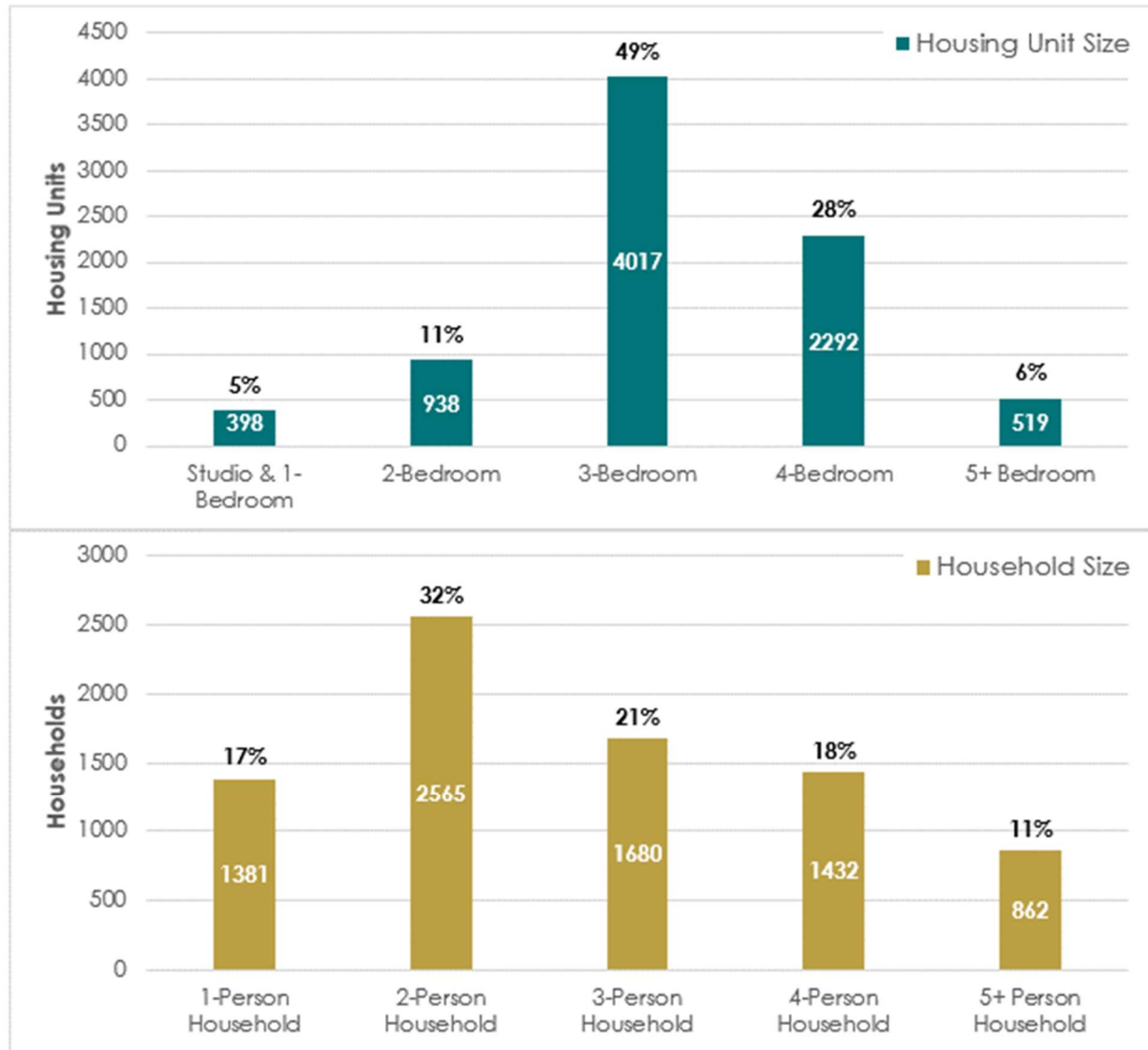
In 2021, almost one-third (32%) of households in Bonney Lake were non-family households, and over half of these (55%) were single individuals (see **Exhibit 14**).

Exhibit 14: Household Composition, Bonney Lake, 2021

Household Type	Count	% of Total
Family	5,399	68%
Married	4,855	62%
Not Married, with Related Children Under 18	514	6%
Non-Family	2,521	32%
Co-Habiting	737	9%
Other Unrelated Persons	403	5%
Alone	1,381	17%

Source: ACS Tables DP-02, 2021

Exhibit 15 shows housing units by the number of bedrooms in a housing unit and the number of households by household size. There is a misalignment between the size of housing units available in Bonney Lake and the size of existing households. About half of households consist of one (1) or two (2) people, yet 83% of housing units have three (3) or more bedrooms.

Exhibit 15: Housing Unit Size vs. Household Size, Bonney Lake, 2021

Source: ACS Tables DP-4 and B25009, 2021

Exhibit 16 shows the range of housing types constructed between 2011 and 2021, including a proportional increase in the construction of studio, 1- and 5-bedroom units.

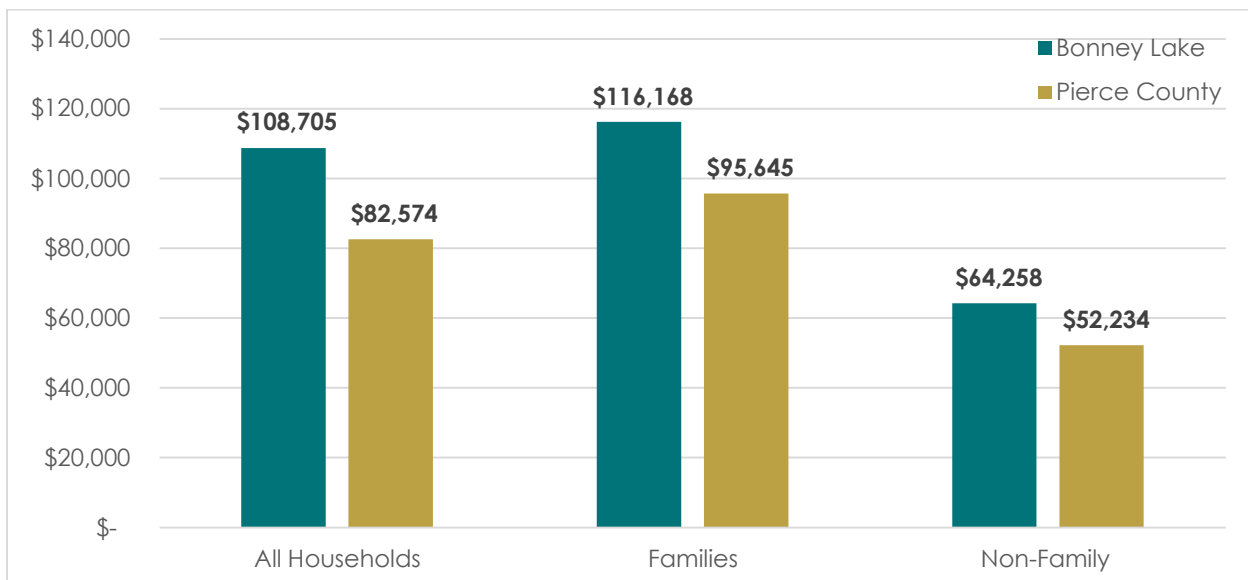
Exhibit 16: Change in Housing Units by Size, Bonney Lake, 2011 – 2021

Housing Unit Size	Housing Units, 2011		Housing Units, 2021		Change %
	Count	%	Count	%	
Studio & 1-Bedroom	196	3%	398	5%	103%
2-Bedroom	630	10%	938	11%	49%
3-Bedroom	3,574	57%	4,017	49%	12%
4-Bedroom	1,533	25%	2,292	28%	50%
5+ Bedroom	305	5%	519	6%	70%

Source: ACS Tables DP-04, 2011 and 2021

Household Income

A household's income often drives its housing decisions and opportunities. The relationship of household income and housing prices is important to understand as Bonney Lake plans for its housing needs. **Exhibit 17** shows the median income in Bonney Lake and Pierce County for all households, families (households with two (2) or more related persons) and non-families. Family incomes are typically higher than non-family incomes due to the higher income from potential dual-income households.

Exhibit 17: Median Household Income by Household Type, Bonney Lake and Pierce County, 2021

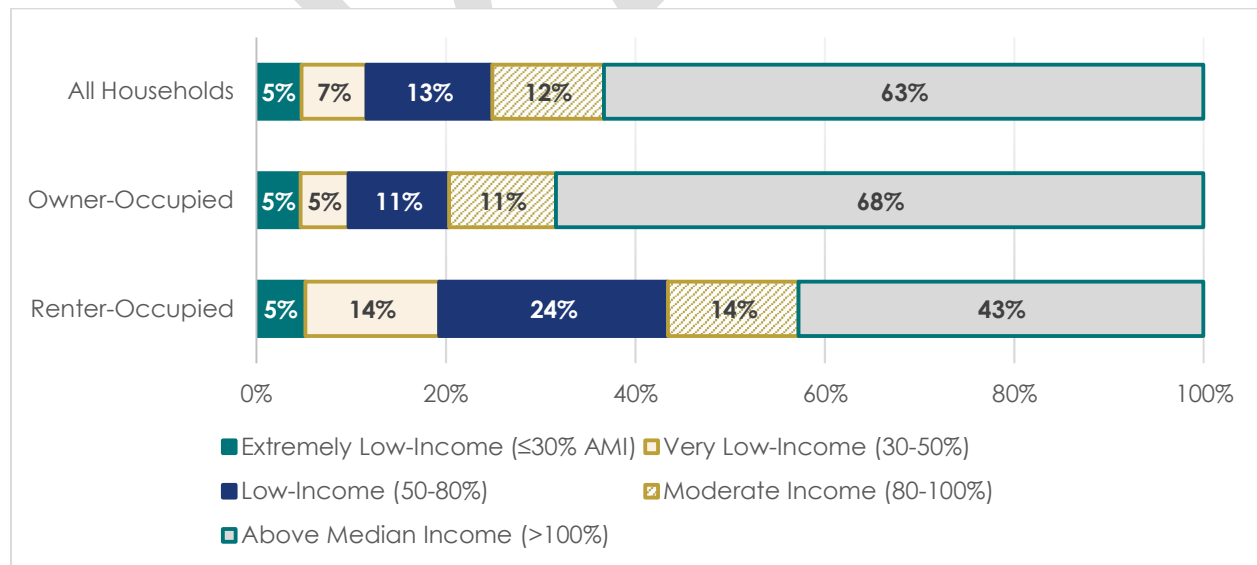
Source: ACS Table S1903, Bonney Lake and Pierce County, 2021

Exhibit 18 summarizes owner- and renter-occupied households in Bonney Lake by income level, relative to Area Median Income (AMI). When summarizing housing affordability by income level, households are typically grouped relative to the HUD-published AMI. Income limits to qualify for income-restricted housing are also often set relative to HUD AMI. The 2020 HUD AMI for Pierce County was \$87,300²⁵. Income groups are typically defined as follows:

- Extremely Low-Income: 30% AMI or less
- Very Low-Income: Above 30% and not exceeding 50% AMI
- Low-Income: Above 50% and not exceeding 80% AMI
- Moderate-Income: Above 80% and not exceeding 100% AMI
- Above Median Income: Greater than 100% AMI

There is a significant difference between owner- and renter-occupied households in Bonney Lake, with owner-occupied households more likely to have incomes above 100% AMI. A majority (68%) of owner-occupied households have incomes at or above AMI, compared to 43% of renter-occupied households. While the proportion of extremely low-income households are the same between both groups, 38% renter-occupied households are very low-income or low-income households, compared to 16% of owner-occupied households.

Exhibit 18: Household by Income Level, Bonney Lake, 2020



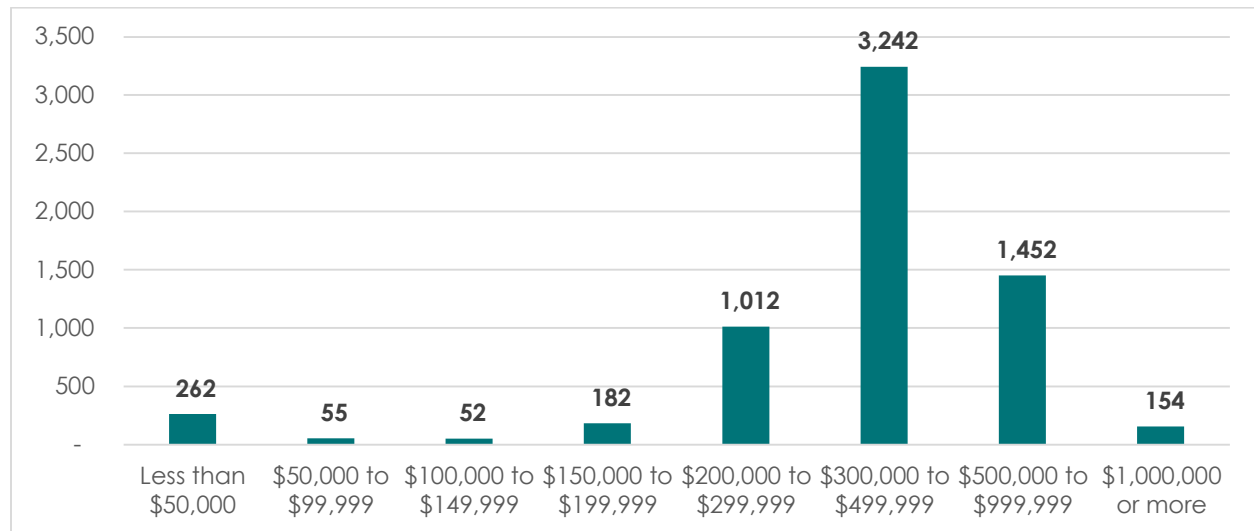
Source: United States Department of Housing and Urban Development (HUD) Comprehensive Housing Affordability Strategy (CHAS) Table 7, 2016-2020

²⁵ 2020 HUD Income Limits are available online at: <https://www.huduser.gov/portal/datasets/il.html#2020>

Housing Costs

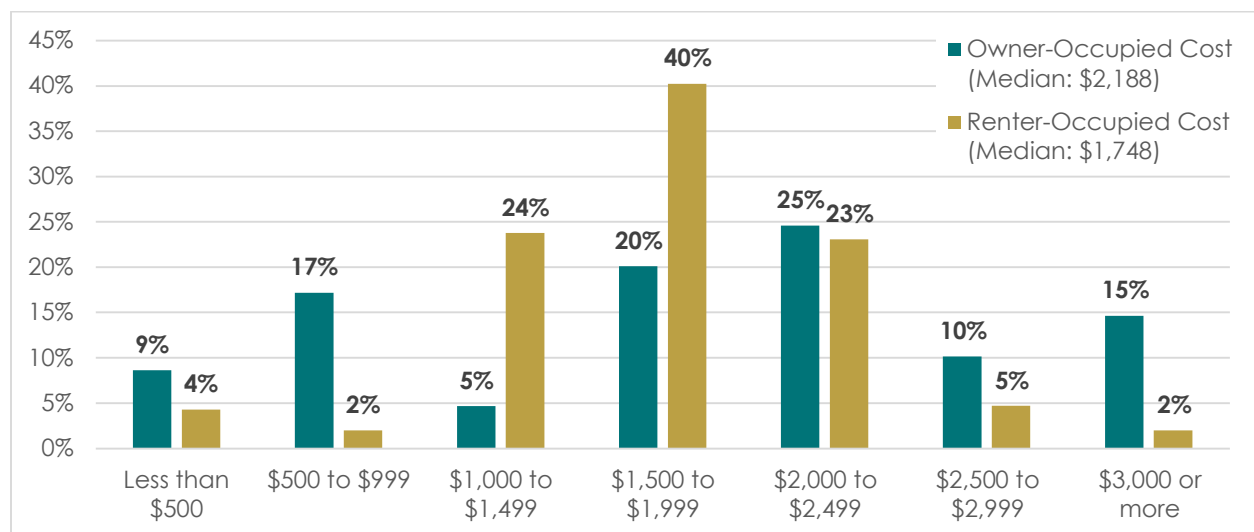
In 2021, the median owner-occupied home value was \$396,700. Just over 50% of the owner-occupied housing units at that time were within \$100,000 of the median home value (see **Exhibit 19**). The median monthly housing cost was \$440 higher for owner-occupied units than renter-occupied units (see **Exhibit 20**).

Exhibit 19: Median Value of Owner-Occupied Housing Units, Bonney Lake, 2021



Source: ACS Table DP04, Bonney Lake, 2021

Exhibit 20: Estimated Monthly Housing Costs for Owner- and Renter-Occupied Units, Bonney Lake, 2021



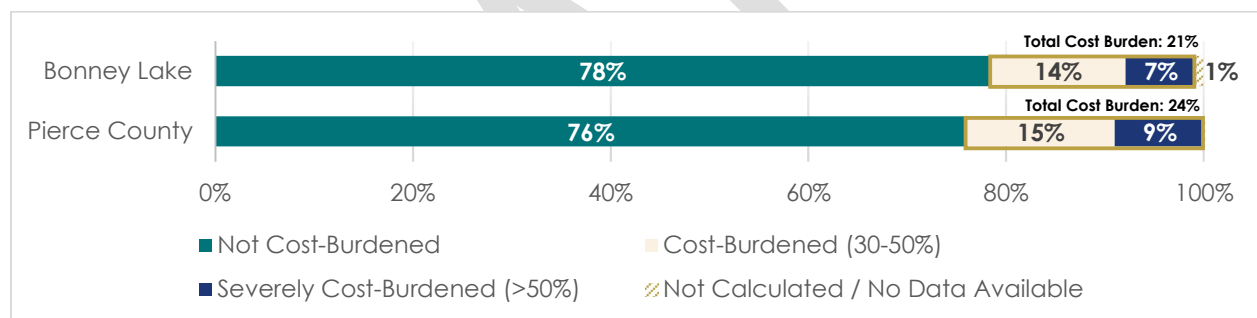
Source: ACS Table DP04, Bonney Lake, 2021

Cost-Burdened Households

One of the biggest determinants of housing need is the number of households that are spending a high proportion of their income on housing. After paying for housing, these households have limited resources left to pay for food, clothing, medical care, transportation, education, and other life necessities. They also have a higher risk of displacement when housing costs rise or when life circumstances change.

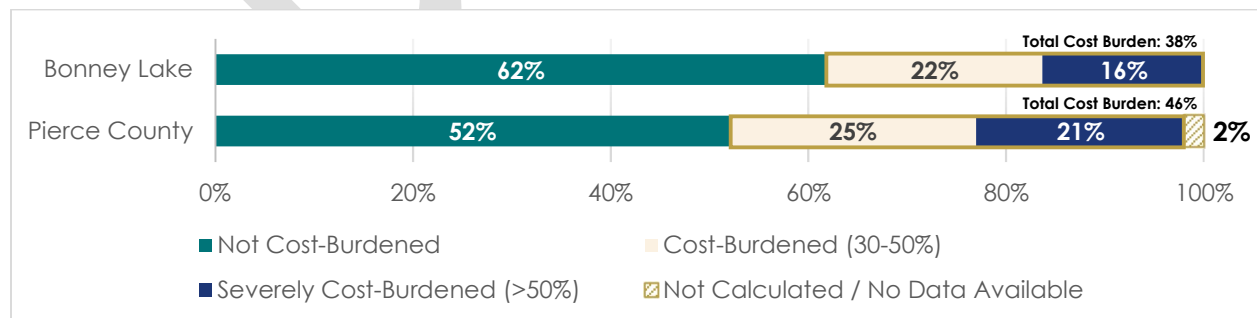
HUD considers households to be cost-burdened if housing costs more than 30% of a household's income, including utilities. Households who spend more than 50% of their income on housing are severely cost-burdened. **Exhibit 21** and **Exhibit 22** present the rate of cost burden for owner- and renter-occupied households in Bonney Lake and Pierce County. While households in Bonney Lake are doing better than the County, 1,124 households of all households (15%) are cost-burdened, and 650 of all households (9%) are severely cost-burdened in Bonney Lake.

Exhibit 21: Rates of Cost Burden for Owner-Occupied Units, Bonney Lake and Pierce County, 2020



Source: HUD CHAS Table 9, 2016-2020

Exhibit 22: Rates of Cost Burden for Renter-Occupied Units, Bonney Lake and Pierce County, 2020



Source: HUD CHAS Table 9, 2016-2020

Housing Affordable to Low-, Very Low-, and Extremely Low-Income Households

Using the HUD income brackets together with the 2020 Bonney Lake median household income of \$100,951, **Exhibit 23** presents a snapshot of the amount that Bonney Lake households earning the median income or less can afford to pay for housing. In 2020, most low-income residents could afford the median rent and moderate-income households could afford the median home price.

Exhibit 23: Housing Affordability Based on Income Bracket, Bonney Lake, 2020

Income Group	Income Used %	2021 Annual Household Income	Maximum Affordable Monthly Rent ²⁶	Maximum Affordable Home Price ²⁷
Extremely Low-Income ($\leq 30\%$ AMI)	30%	\$30,285	\$757	\$115,000
Very Low-Income (30-50%)	45%	\$45,428	\$1,136	\$192,500
Low-Income (50-80%)	65%	\$65,618	\$1,640	\$296,000
Moderate Income (80-100%)	90%	\$90,856	\$2,271	\$425,000
		Median Income	Median Rent	Median Home Price
Bonney Lake Median		\$100,951	\$1,658	\$375,500

Source: ACS Tables S1901, S2503 and S2506, 2020; Pierce County Tax Rates for 2020; Federal Reserve Bank of St. Louis 30-Year Fixed Rate Mortgage Average in the United States, 2010-2020; NerdWallet Average Home Insurance Cost, 2020; Federal Housing Administration Mortgage Calculator (<http://usmortgagecalculator.org>); Zillow Rent Affordability Calculator (<https://www.zillow.com>)

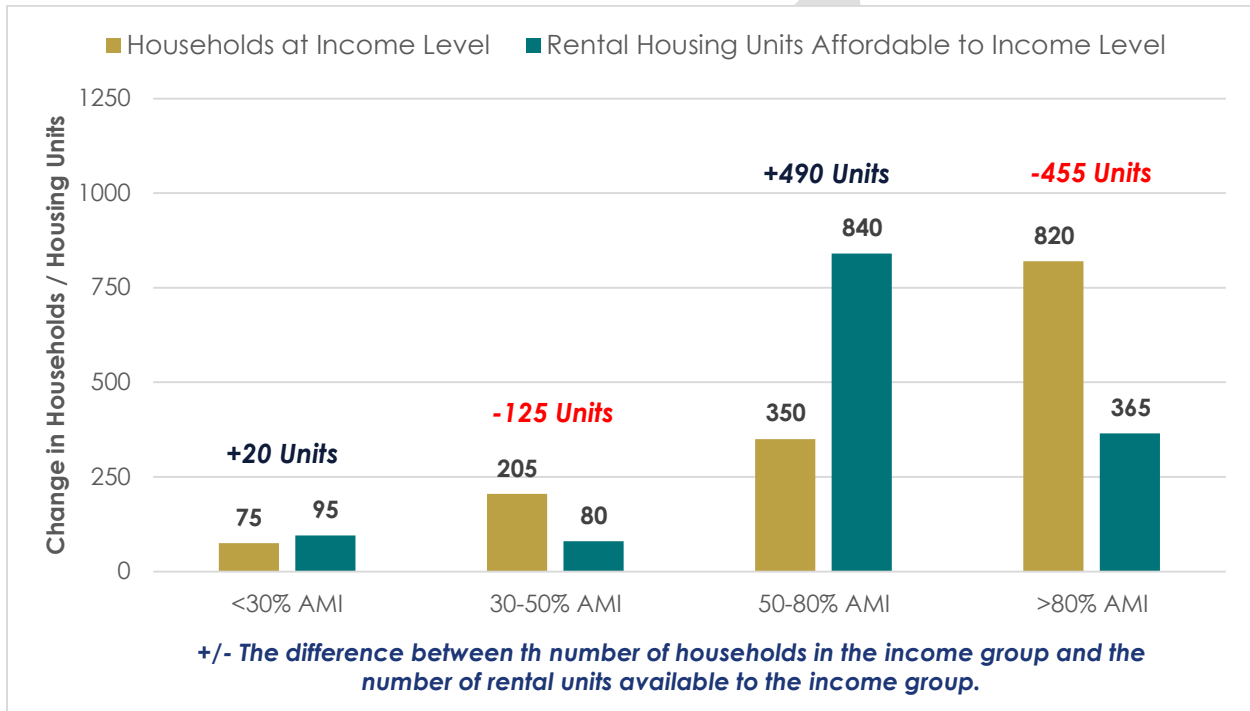
Exhibit 24 compares the estimate of rental households and rental housing units (both occupied and vacant) at each income or affordability level. The comparison helps identify gaps in the available rental housing for the renter households in the jurisdiction. Shortfalls and surpluses suggest a mismatch between the rental housing need and availability. A surplus indicates that either a lower-income household is experiencing housing cost burden, or that a higher-income household is "down renting" by paying less than they can afford in rental housing. High rates of down renting by

²⁶ Assumes maximum rent is 30% of monthly income.

²⁷ Assumes 1) a 20% down payment; 2) a 30-year fixed rate mortgage of 3.15% (the average of weekly interest rates between June 2010 – June 2020); 3) a property tax rate of 13.406% per \$1,000 (based on Pierce County Assessor 2020 Average Levy Rate for Bonney Lake); 4) annual homeowner insurance costs of \$1,000 (based on the average cost of homeowner insurance in Washington in 2020); 5) homeowner's association dues of \$100 per month; and 6) a maximum monthly payment of 28% and a maximum debt-to-income ratio of 36%, consistent with mortgage lender guidelines. No debt was assumed as part of the calculation.

moderate-income households are associated with an undersupply of entry-level homeownership options. In 2020, there was an undersupply of housing units for very low-income households and an undersupply of market-rate housing units for households making 80% or more of Bonney Lake's annual median household income. Since 2021, construction was completed on The View by Vintage, a community with 408 income-restricted housing units serving those making 60% or less of Pierce County AMI.

Exhibit 24: Renter Households by Income and Rental Units by Affordability, Bonney Lake, 2020



Source: HUD CHAS Tables 14B and 15C, 2010-2014 and 2016-2020

Jobs-to-Housing and Jobs-to-Labor Force Ratios

The jobs-to housing ratio is a tool to help jurisdictions evaluate whether the available jobs and housing are roughly equal. Ideally, jobs match the available labor force, and housing is available at prices, forms, and locations suited to workers who wish to live in the area.

Typically, this balance is expressed by a jobs-to-housing ratio, which is determined by dividing the total amount of jobs by the total number of housing units in an area. In Washington, employment data is typically derived from the Washington State Employment Security Department which identifies the number of jobs covered by unemployment insurance within a given area. This measurement of employment does not include the armed forces, jobs with the federal government, self-employed workers,

and sole proprietors as these jobs are not “covered” by unemployment insurance. Therefore, the actual total amount of employment is higher than the number of “covered” jobs utilized to calculate the ratio.

A number close to 1.0 indicates a “balance” of jobs and housing. A high imbalance between the number of individuals living and working in the same community contributes to increases in commuting times, energy consumption, and the emission of vehicle pollutants, while decreasing opportunities for non-motorized commuting options (walking and bicycling).

Due to the number of dual wage-earning households, a reasonable ceiling signifying balance is a job to housing ratio of 1.5. In 2021, Bonney Lake’s jobs-to-housing ratio was 1.35, an increase from a ratio of 0.70 in 2014, and greater than the Pierce County ratio of 1.16.

The downside of the jobs to housing ratio is that it does not provide the actual number of individuals that live and work in the same community. Another drawback to the methodology is that it treats all housing units as equal, even though housing units can contain different numbers of workers, consist of retirees, or could be vacant.

Another approach is to evaluate the total number of jobs compared to the size of the civilian labor force living in a community. As this measurement compares the total number of individuals in the labor force to the number of jobs, balance is a ratio of 1.0. Bonney Lake has jobs-to-labor force ratio of 0.64, less than the Pierce County ratio of 0.90.

While both ratios can provide some insights, neither measure can identify the actual number of people who live and work in the same community, due to variables such as the nature of jobs within the area, the skills and education of the residents, and the price of housing. Based on the U.S Census Bureau's Longitudinal Employer – Household Dynamics (LEHD) data, approximately 9% of the labor force in Bonney Lake worked and lived within the City in 2021.

Barriers to Housing Construction

In order to ensure there are adequate provisions for existing and projected housing needs for all economic segments of the community, the City evaluated barriers to housing needs, including barriers to emergency housing and permanent supportive housing.

Exhibit 25 includes the identified barriers and actions needed to remove these barriers.

Exhibit 25: Summary of Potential Housing Barriers

Barrier	Actions to Consider to Address Barrier
Development Regulations	
Development Regulations Clarity	Update development regulations to add missing definitions and remove inconsistencies, such as conflicting density requirements. Update ADU regulations to comply with state law and HB 1337. Evaluate requirement for safety inspections and separation of use for supportive, transitional, and emergency housing.
Impervious Coverage Limits	May be restrictive for some housing types; review whether it is possible to adjust this in conjunction with stormwater regulations and National Pollutant Discharge Elimination System (NPDES) Municipal Stormwater Permit requirements.
Large Setback Requirements	Review reduction of setbacks to provide more flexibility in placement of housing units.
Moderate Density Housing Types	Update land use matrix to show additional allowed housing types. Consider role of live-work units.
Number of Occupants	Ensure the municipal code are consistent with state law and construction codes.
Tree Retention Standards	Clarify tree retention standards to streamline processing and ensure clear expectations for retaining trees of significance.
Process Obstacles	
Access to Information	Update website, brochures, and applications materials to ensure information on process, application status, and fees is accesible.
Design Review	Review the Downtown Bonney Lake Design standards to remove barriers to housing.
Impact Fees	Evaluate and update impact fees consistent with state law.
Processing Time and Staffing	Update permit procedures consistent with SB 5290 and ensure staffing levels are maintained.

Barrier	Actions to Consider to Address Barrier
Limited Land Availability and Environmental Constraints	
Environmental Constraints	Many of the remaining undeveloped parcels have an environmental constraint. Review the environmental regulations to see if appropriate updates or flexibility could assist with housing production.
Funding Gaps	
Application Fee Waivers (RCW 36.70A.540)	Consider fee reductions or waivers for development of affordable housing.
Impact Fee Waivers (RCW 82.02.060)	Consider impact fee reductions or waivers for development of affordable housing.
Multifamily Tax Exemption (MFTE) (Chapter 84.14 RCW)	Evaluate implementation of an MFTE program in Bonney Lake.

Source: Adapted from Washington State Department of Commerce Periodic Update Checklist for Fully-Planning Cities and Counties with Additional Checklist Items for Housing Element Review (May 2024)

Housing Action Plan

In 2021, the City completed a joint Housing Action Plan (HAP) with the City of Sumner to better understand existing and future housing needs through the development of a Housing Needs Assessment (HNA) and strategies to ensure those needs are met. The HAP was adopted under Ordinance No. 1654 (see HAP for full details). The HAP recommended the following strategies for Bonney Lake:

- Strategy 1: Preserve Rental Housing
- Strategy 2: Incentivize New Rental Housing
- Strategy 3: Bring Down the Cost of Development
- Strategy 4: Provide a Wider Variety of Housing Types
- Strategy 5: Prevent and Mitigate Displacement
- Strategy 6: Improve the Permit Process

Recommended Actions to support those strategies and the status of those actions are shown in **Exhibit 26**:

Exhibit 26: Housing Action Plan Recommended Actions and Status

Action Topic	Strategy						Status
	Rental Housing		Costs	Variety	Prevent / Mitigate	Permit Process	
	1	2	3	4	5	6	
ADU Construction			X	X			●
Affordable Housing Preservation	X				X		○
Affordable Housing Sales Tax	X				X		○
Inclusionary Zoning Incentives		X			X		○
Income-Restricted Housing			X	X			○
Missing Middle Housing Construction			X	X			◐
Multi-Family Tax Exemption (MFTE)		X	X	X	X		○
Open Space / Recreation Requirements			X				●
Parking Calculation Based on Bedrooms			X				●
Reduce Infrastructure Costs			X				◐
State Environmental Policy Act (SEPA) Implementation			X			X	●
Streamline Design Review			X				◐
Streamline Permit Process						X	◐
Tiny Home Regulations				X			○
Townhomes Allowed in More Zones				X			◐

Complete = ●

In Progress = ◐

Not Started = ○

Source: Adapted from Bonney Lake – Sumner Housing Action Plan

Housing Equity

As of 2021, the GMA requires local jurisdictions to identify policies and regulations that could or may have resulted in racially disparate impacts, displacement, and exclusion in housing. The City of Bonney Lake completed a Housing Equity Report (HER), adopted by reference in **Appendix TBD** (see HER for full details). Key findings of the HER include:

Intentional Discrimination in Housing

- No evidence of racially restrictive covenants was found.
- No evidence of redlining was found.

Racially Disparate Impacts in Housing

- Bonney Lake has significantly higher rates of homeownership than Pierce County amongst all but one racial and ethnic group.
- Housing cost burden is higher among American Indian, Other, and Hispanic households in owner-occupied housing and White and Other households in renter-occupied housing.
- As of 2021, Bonney Lake does not have a shortage of homes affordable to low income and very low-income households. The number of housing units affordable in each income category has increased since 2011.
- American Indian households face a significant gap (\$240,500) between the home price the household can afford and the cost of a median-priced home in Bonney Lake. Multi-racial households face a smaller gap of \$77,000.
- The Hispanic median household income is higher than the citywide median; however, the homeownership rate lags 18% behind the citywide rate.

Displacement Risk

- There are no areas of higher displacement risk in Bonney Lake; however, American Indian and Alaska Native residents are at the highest risk of displacement.
- The rate of foreclosures and evictions are lower in Bonney Lake than elsewhere.
- Overall housing quality is high, though there are a small number of units which have inadequate plumbing and heating sources.

Exhibit 27: Summary of Observed Disparities

	White	Black	American Indian or Alaska Native	Asian	Native Hawaiian or Pacific Islander	Multi-Racial	Other	Hispanic, Any Race
Racially Disparate Impacts	○	○	○	○	Limited Data	○	●	◐ (gap is closing)
Exclusionary Housing	○	○	○	●	○	◐	◐	●
Displacement Risk	○							

Yes = ●

Partial = ◐

No = ○

3.3 IDENTIFIED HOUSING NEEDS

The GMA requires Pierce County and its cities to evaluate development (land consumption) over time to determine whether the adopted urban growth areas and zoning density provide land capacity sufficient to accommodate the adopted population and housing projections.

In 2017, the Washington State Legislature passed E2SHB 5254²⁸, which required the County to complete a more rigorous analysis as part of the Buildable Lands Report. This analysis allowed the County to identify where there was a gap between actual development patterns and planned targets, for jurisdictions with a significant gap to take reasonable measures to reduce that gap. Reasonable measures may include updating and/or clarifying development regulations, rezoning property, increasing density, and other actions aimed at assuring growth can be accommodated (RCW 36.70A.215).

The 2022 Buildable Lands Report²⁹ found that while there was a slight difference between targets and zoned capacity in Bonney Lake, it was not significant enough to warrant requiring Bonney Lake to enact reasonable measures related to housing.

Population Growth Allocation

Pierce County adopted population growth targets for 2044 under Pierce County Ordinance No. 2022-46s^{30, 31} (see **Exhibit 28**).

Exhibit 28: Population Allocation, Bonney Lake, 2020 – 2049

	2020	2044		2049 ³²	
	Census Population	Growth Allocation	Total	Planning Horizon	Total
Pierce County Adopted Target	22,487	3,591	26,078	748	26,826
Land Capacity Analysis Assumption		3,880	26,367	1,162	27,529

Source: Adapted from Pierce County Ordinance No. 2022-46s and the Bonney Lake Land Capacity Analysis

²⁸ Available online at: <https://lawfilesexternal.wa.gov/biennium/2017-18/Pdf/Bills/Session%20Laws/Senate/5254-S2.SL.pdf>

²⁹ Available online at: <https://www.piercecountywa.gov/923/Buildable-Lands>

³⁰ Available online at: https://online.co.pierce.wa.us/cfapps/council/iview/proposal.cfm?proposal_num=2022-46s

³¹ Exhibit C of Pierce County Ordinance No. 2023-22s states that the population or employment targets adopted under Ordinance No. 2022-46s were not amended – see Finding 20.

³² The average annual growth rate was extended at a constant rate to establish an estimated total target for the 2049 planning horizon. This is an assumption to assist in making growth related decision for various City utilities and services and to coincide with the centennial of the City.

Housing Growth Allocation

Consistent with E2SHB 1220 (see **Section 3.1**), Pierce County adopted revised housing growth targets for 2044 under Pierce County Ordinance No. 2023-22s³³ (see **Exhibit 29**). Developed in coordination with cities and towns, the growth allocation ensures each jurisdiction accommodates its proportionate share of housing affordable to all income segments, as well as plans and accommodates for an adequate supply of emergency housing, emergency shelters, and permanent supportive housing (PSH).

Exhibit 29: Housing Allocation by Income, Bonney Lake, 2020 – 2049

	2020	2044 ³⁴		2049 ³²	
	Existing Supply	Growth Allocation	Total	Planning Horizon	Total
Total	7,605	1,451	9,056	526	9,582
Extremely Low-Income (≤30% AML)					
Non-Permanent Supportive Housing	67	187	254		
Permanent Supportive Housing ³⁵	0	253	253		
Very Low-Income (>30-50%)	542	269	811		
Low-Income (>50-80%)	1,124	213	1,337		
Moderate Income (>80-100%)	1,709	92	1,801		
Median Income (>100% – 120%)	1,217	83	1,300		
High Income (≥120%)	2,936	354	3,290		
Emergency Housing Needs (Beds) ^{36,37}	0	89			

Source: Pierce County Ordinance No. 2023-22s.

³³ Available online at:

https://online.co.pierce.wa.us/cfapps/council/iview/proposal.cfm?proposal_num=2023-22s

³⁴ The City is required to demonstrate that there is sufficient development capacity to accommodate future identified housing needs consistent with the GMA and the MPPs.

³⁵ Permanent supportive housing is subsidized housing for people who need comprehensive support services. For the full definition, see [RCW 36.70A.030\(31\)](#).

³⁶ Emergency housing is temporary housing for those homeless or at imminent risk of becoming homeless that is intended to address basic, short-term health, food, clothing, and personal hygiene needs. For the full definition, see [RCW 36.70A.030\(14\)](#).

³⁷ Emergency shelter is a facility that provides temporary shelter for those who are currently homeless. Emergency shelter facilities may include overnight day and warming centers. For the full definition, see [RCW 36.70A.030\(15\)](#).

Land Capacity Analysis

The Land Capacity Analysis (LCA, see **Appendix TBD**) evaluated existing zoning designations and whether there was adequate capacity to support future growth. Based on that analysis, the City completed a Growth Alternatives Memo (see **Appendix TBD**) to evaluate potential zoning scenarios that would accommodate the adopted population and housing targets due to an existing housing capacity deficit very low- and extremely low-income households.

On April 23, 2024, City Council identified *Alternative 2: Bend the Trend*, as the Council's preferred growth alternative (Motion No. M24-33). This alternative anticipates a surplus of housing capacity for all income levels through 2044 (see **Exhibit 30**) and is the basis for the capacities shown in this subsection.

Exhibit 30: Housing Capacity Summary, Bonney Lake, 2020 – 2044

	2044		Permitted Units 2020-2023	Total Pipeline Capacity	Total Zoned Capacity ³⁸	Capacity Surplus or Deficit
	Growth Allocation	Aggregate Need				
Total	1,451		682	156	1,498	+885
Extremely Low-Income (≤30% AMI), Non-Permanent Supportive Housing	187	709	0	0	886	+177
Extremely Low-Income (≤30% AMI), Permanent Supportive Housing	253					
Very Low-Income (>30-50%)	269					
Low-Income (>50-80%)	213	213	408	0	0	+195
Moderate Income (>80-100%)	92	175	104	72	106	+107
Median Income (>100% – 120%)	83					
High Income (≥120%)	354	354	170	84	506	+406

Source: Adapted from Bonney Lake Growth Alternatives Memo

HB 1220 further requires cities to identify sufficient capacity for emergency housing, emergency shelters, and permanent supportive housing (PSH) and requires cities to allow the land use in all residentially zoned areas and zones where hotels are permitted. Even

³⁸ **Total zoned capacity** is the capacity for additional housing units from vacant and developable land or from pipeline development projects.

though the City currently does not have any zones where hotels are a permitted use, the City allows for PSH and transitional housing in all zones that allow residential type uses.

Pierce County's Ordinance No. 2023-22s also set Emergency Housing targets for the 2020-2044 planning period. The City is required to demonstrate there is sufficient capacity to support 89 beds. The LCA identified vacant land in the Eastown and Public Facilities zoning districts to accommodate the required Emergency Housing, because it is most likely to support the development of this type of housing (see **Exhibit 31**).

Exhibit 31: Emergency Housing Capacity, Bonney Lake, 2020 – 2044

Site Grouping	Maximum Density	Capacity (Beds or Units)	Total Capacity	Total Need	Capacity Surplus or Deficit
Tiny Shelter Villages	30 units / acre	120	360	89	+271
Emergency Congregate Shelter	60 units / acre	240			

Source: Adapted from Bonney Lake Land Capacity Analysis

HB 1220 requires cities to consider the role of accessory dwelling units (ADUs) in meeting housing needs³⁹. Engrossed Housing Bill (EHB) 1337 was passed by the Washington State Legislature during the 2023 legislative session. EHB 1337 further requires cities to allow up to two Accessory Dwelling Units (ADUs) on all lots zoned to allow single-unit housing⁴⁰. As part of the LCA, the City evaluated capacity for additional ADU construction in the upcoming 20-year planning period (see **Exhibit 32**).

Exhibit 32: Accessory Dwelling Unit Capacity, Bonney Lake, 2020 – 2044

Total Available Lots	Assumed Participation Rate	Potential ADU Lots	Estimated ADUs per Lot	Estimated Additional ADUs in 2044
4,261	2.00%	85	1.25	107

Source: Adapted from Bonney Lake Land Capacity Analysis

³⁹ See RCW 36.70A.070.2.d.iv: <https://app.leg.wa.gov/RCW/default.aspx?cite=36.70A.070> ⁴⁰ Lots must meet or exceed the minimum lot size for the zone if one is established. Lots with critical areas or their buffers are exempt from the requirements of HB 1337.

⁴⁰ Lots must meet or exceed the minimum lot size for the zone if one is established. Lots with critical areas or their buffers are exempt from the requirements of HB 1337.

3.4 HOUSING GOALS AND POLICIES

The policies in this section identify actions the City should consider over the upcoming planning period to achieve the stated goals.

Goal CD-H-1: Provide a variety of housing options that will meet the needs of all Bonney Lake's current and future residents and are affordable to all economic segments of Bonney Lake.

- Policies:**
- CD-H-1.1** Ensure that sufficient acreage and densities are designated on the Future Land Use Map and Zoning Map to enable reaching the City's allocated 20-year housing growth targets.
 - CD-H-1.2** Update the City's development regulations to permit a range of housing types that is consistent with the City's growth strategy. This may include attached and detached single-unit dwellings, cottages, townhomes, accessory dwelling units, apartments, mixed-use, permanent supportive housing, income-restricted housing, and emergency shelters.

Goal CD-H-2: Encourage preservation and rehabilitation of the existing housing stock.

- Policies:**
- CD-H-2.1** Encourage the maintenance, repair, and rehabilitation of the City's existing housing stock by encouraging homeowners to take advantage of existing maintenance, repair, weatherization, and preservation programs, services, and resources.
 - CD-H-2.2** Promote private and public efforts to preserve the existing quality housing stock by maintaining sound units, rehabilitating substandard units, and replacing severely deteriorated units.
 - CD-H-2.3** Encourage health-related improvements to older homes, including the removal of lead-based paint, asbestos, and other potentially harmful materials.
 - CD-H-2.4** Encourage the rehabilitation and reuse, rather than demolition, of existing housing.

Goal CD-H-3: Recognize that existing mobile and manufactured home parks provide an affordable housing option for Bonney Lake residents.

- Policies:**
- CD-H-3.1** Preserve and maintain existing mobile and manufactured home parks that are in proximity to essential services and multi-modal transportation options.

- CD-H-3.2** Allow the use of recreational vehicles (RVs) as a primary residence within mobile and manufactured home parks when all applicable regulations can be satisfied.

Goal CD-H-4: Take reasonable steps to prevent displacement of existing residents.

- Policies:**
- CD-H-4.1** Support ways for older adults and people with disabilities to remain in the community as their housing needs change by encouraging universal design or retrofitting homes for lifetime use.
 - CD-H-4.2** Adopt regulations to require relocation assistance to households that are displaced by new development or capital improvements.
 - CD-H-4.3** Adopt regulations to require owners of apartments or mobile and manufactured home parks to notify tenants and the City in advance of a sale.
 - CD-H-4.4** Adopt regulations that provide residents and other eligible organizations an opportunity to purchase or lease a mobile and manufactured home parks prior to any sale, lease, or transfer.
 - CD-H-4.5** Provide information on Pierce County's tax assistance program to connect seniors and other special needs populations with available County resources.
 - CD-H-4.6** Explore the use of existing affordable housing revenue from the State to support a local rental assistance program.

Goal CD-H-5: Establish minimum property maintenance standards to ensure the general health, safety, and welfare of residents.

- Policies:**
- CD-H-5.1** Support healthy and safe housing by developing and implementing programs to address unfit dwellings, nuisances, and environmental hazards (e.g. excessive noise, poor air quality, light pollution, illegal dumping, illegal signage, graffiti, littering, etc.).

Goal CD-H-6: Encourage the development of a wide variety of high-quality housing types to accommodate the diverse needs of Bonney Lake's community members through changes in age, household size, income, mobility, and housing preferences.

- Policies:**
- CD-H-6.1** Allow a variety of residential densities and housing types to enable the development of housing to meet the needs of people of all incomes throughout their lifetime.

- CD-H-6.2** Allow additional housing types, such as cottages, attached single-unit dwellings, townhouses, and accessory dwelling units (ADUs), in low-density residential zones.
- CD-H-6.3** Allow ADUs within new and existing low-density developments and explore opportunities to promote ADU construction in existing homes.
- CD-H-6.4** Allow manufactured homes in all residential zones that allow attached or detached single-unit housing.
- CD-H-6.5** Encourage the fair distribution of housing throughout the City, recognizing that some clustering may be appropriate if in proximity to services and multi-modal housing options.
- CD-H-6.6** Support the development of housing affordable to households earning 30%, 50%, and 80% of median income, as required by State law, and promote mixed-use developments through financial tools, such as the adoption and implementation of a Multi-Family Tax Exemption (MFTE) program.

Goal CD-H-7: Support a range of housing choices for workers at all income levels throughout the City in a manner that promotes accessibility to jobs and provides opportunities to live in proximity to work.

- Policies:**
- CD-H-7.1** Allow housing in the Centers for a variety of incomes, age groups, and household types
 - CD-H-7.2** Focus efforts to increase housing in Centers and other areas where jobs, supporting services, and multi-modal transportation choices can be provided.
 - CD-H-7.3** Encourage adapting non-residential buildings for housing, consistent with State law.

Goal CD-H-8: Support access to homeownership for first-time home buyers.

- Policies:**
- CD-H-8.1** Provide information to residents, including underserved populations, on first-time homeownership programs.
 - CD-H-8.2** Encourage existing housing providers and private lenders to provide home buyer education seminars for potential first-time homebuyers; include outreach to current renters.

Goal CD-H-9: Enable the provision of special needs and emergency housing.

Policies:	CD-H-9.1	Support actions by agencies, private developers and non-profit organizations to secure grants and loans tied to the provision of special needs housing.
	CD-H-9.2	Support programs that allow people with special needs to independently remain in their own homes for as long as they desire (e.g., home maintenance and repair; home health care; meal programs).
	CD-H-9.3	Allow inter-generational housing for individuals or families who desire to care for members of their household with special needs.
	CD-H-9.4	Encourage a range of housing types for special needs households at a variety of incomes, such as independent living, various degrees of assisted living and skilled nursing care facilities.
	CD-H-9.5	Permit group homes as required by state and federal law, including where residents receive supportive services such as counseling, foster care, or medical supervision, within any type of dwelling unit.
	CD-H-9.6	Develop regulations for use of alternative housing forms, such as tiny houses, to help meet allocated emergency housing needs in selected areas of the City, as required by State law.
	CD-H-9.7	Permit the development of emergency, transitional and permanent housing with appropriate on-site services for persons with special needs, including but not limited to seniors, persons with disabilities, veterans, at-risk youth, and victims of domestic violence.

Goal CD-H-10: Take reasonable action to reduce barriers to meeting housing growth targets in development regulations and permit procedures.

Policies:	CD-H-10.1	Craft regulations and procedures to provide a high degree of certainty and predictability and minimize unnecessary time delays in the review of permit applications, while still maintaining the integrity of the permitting process and adequate opportunities for public involvement and review.
	CD-H-10.2	Update development regulations as needed to keep the unit cost of new housing down while providing for a quality living environment for residents.
	CD-H-10.3	Analyze how amendments to development regulations and procedures may impact the cost to permit, construct, repair, and rehabilitate housing.

CD-H-10.4 Make reasonable accommodations in rules, policies, practices, and services when such accommodations may be necessary to afford persons with disabilities equal opportunity to complete the permit process and use a dwelling.

CD-H-10.5 Support the development of ADUs through streamlined permitting, education and resources, and regular monitoring of the ADU regulations, as required by State law.

Goal CD-H-11: Ensure high-quality housing through clear, objective design and construction standards.

- Policies:**
- CD-H-11.1** Ensure that adequate buffer and building design standards minimize the impacts of more intensive development on adjacent residential uses, by incorporating design guidelines in the development code and enforcing building code requirements. Design guidelines should be clear and objective and should address visual consistency, height transitions, and buffers.
 - CD-H-11.2** Provide effective transitions between different uses and intensities, including between new housing and existing housing, through development regulations that address design and scale.
 - CD-H-11.3** Allow "clustering" of housing to preserve and protect environmentally sensitive areas.

Goal CD-H-12: Ensure that adequate services and infrastructure are planned to support the allocated housing target.

- Policies:**
- CD-H-12.1** Provide physical infrastructure, park, recreational and cultural amenities, and coordinate the provision of educational facilities throughout the City to support the creation of attractive neighborhoods for residents of all ages, incomes, and household types.
 - CD-H-12.2** Communicate early with residents served by on-site septic systems or wells when planned utility extensions or rezoning may impact them.

Goal CD-H-13: Strive to reduce disparate housing impacts, exclusion, and displacement risk in Bonney Lake, by acting within the City's power to update plans, policies, and development regulations.

- Policies:**
- CD-H-13.1** Monitor and report trends related to disparate housing impacts, exclusion, and displacement risk at times when implementation

reports and periodic updates are done for the Comprehensive Plan.

- CD-H-13.2** If trends monitored under Policy CD-H-13.1 are worsening, review City plans, policies and development regulations and update as needed to improve outcomes. Ask for input from the people experiencing the impacts to inform City actions.
- CD-H-13.3** Prevent discrimination and encourage fair and equitable access to housing for all persons in accordance with state and federal law.

Goal CD-H-14: Ensure coordination with regional agencies to address regional and City housing needs.

- Policies:**
- CD-H-14.1** Identify local housing needs and priorities, and coordinate with community partners to address those needs, including housing rehabilitation.
- CD-H-14.2** Actively work with Pierce County and other local governments to investigate and implement regional funding options to support the development and/or maintenance of affordable housing such as a regional housing trust fund, regional housing tax levy, real estate excise tax or other mechanisms.
- CD-H-14.3** Support the work of for-profit and non-profit housing developers to facilitate construction or acquisition of housing units for households earning 30%, 50%, and 80% of median income.
- CD-H-14.4** Work with Pierce County and health and social service organizations to develop a coordinated, regional approach to homelessness.
- CD-H-14.5** Support housing legislation at the local, regional, state, and federal levels to promote the goals and policies of this Comprehensive Plan.

4. ECONOMIC VITALITY

Economic vitality is essential to ensure the continuous growth and development of Bonney Lake. Economic growth provides jobs and assures a stable tax base for a local community. In order to attract new commercial and industrial developments, Bonney Lake must develop a strategy for economic growth.

- Bonney Lake Comprehensive Plan (1985)

4.1 PLANNING FOR ECONOMIC VITALITY

Growth Management Act

A healthy economy is vital to creating and maintaining a high standard of living and quality of life for residents in the Central Puget Sound Region. The Growth Management Act (GMA) emphasizes regional coordination of economic development planning as one of the elements of a comprehensive plan (RCW 36.70A.070(7)). The requirement for an economic development element is conditioned on the availability of state funds, which have not been provided to date (RCW 36.70A.070(10)).

The City chose to develop this sub-element consistent with RCW 36.70A.070(7), which encourages "... establishing local goals, policies, objectives, and provisions for economic growth and vitality and a high quality of life....". This sub-element focuses on "economic vitality" rather than simply "economic development". Economic vitality is a process to improve the economic well-being of the community that protects the physical environment, provides a healthy economy, encourages employment opportunities, improves the socio-economic opportunities for citizens, expands the local tax base, facilitates economic opportunity and encourages the efficient use of land. It recognizes growth cannot outpace a local jurisdiction's availability to provide public services and facilities.

This sub-element was also prepared to be generally consistent with adopted multi-county planning policies (MPPs) and county-wide planning policies (CPPs).

Multi-County Planning Policies (MPPs)

The Puget Sound Regional Council (PSRC) has adopted goals and associated MPPs in VISION 2050⁴¹ that encourage coordination between the public sector, private sector,

⁴¹ Available online at: <https://www.psrc.org/planning-2050/vision-2050>

and the education and workforce development systems to develop, support, and sustain the regional economy. These goals and MPPs focus on:

- **Expanding Economic Opportunity:** Striving for balanced job creation across the region to broaden opportunities and create a better jobs-housing balance, particularly through equity, childcare job distribution and broadband access.
- **Global Competitiveness:** Maintaining the region's competitive advantages in the global economy through trade development, supporting key industrial sites, business recovery and resilience.
- **Quality of Life:** Addressing the foundation of a sustainable economy and its workers through access to affordable housing near jobs, investment in transportation systems, and addressing chronic homelessness.

PSRC has adopted a strategic plan, known as the Regional Economic Strategy⁴², which identifies specific near-term actions the organization uses to implement the goals and MPPs, and to support local economic development planning. Cities are encouraged to adopt an economic development element in the MPPs.

County-Wide Planning Policies (CPPs)

Similar to the MPPs, Pierce County's adopted CPPs⁴³ focus on regional coordination, economic diversity, and balance. The CPPs address:

- **Quality of Life:** Balance business and job creation, environmental quality, creation of central places, and sustaining diverse communities to support a high quality of life.
- **Expanding Economic Opportunity:** Promote economic opportunities for all, especially the unemployed, disadvantaged persons, minorities, and small businesses.
- **Plan for Growth:** Balance the costs of growth and development with the benefits of diverse land uses.
- **Support Existing Businesses:** Maintain infrastructure, support services, and ensure information is readily accessible to help existing businesses thrive and grow.
- **Regional Coordination:** Work with other jurisdictions to share information and coordinate attracting new industries.

⁴² Available online at: <https://www.psrc.org/our-work/economy>

⁴³ Pierce County Ordinance No. 2022-29 is available online at:
https://online.co.pierce.wa.us/cfapps/council/iview/proposal.cfm?proposal_num=2022-29

4.2 ECONOMIC PROFILE

Job Base and Wages

According to the US Census Data's Longitudinal Employment-Housing Data, Bonney Lake's largest employment base is in the Retail and Food Service sectors, which account for 56% of the jobs within Bonney Lake. Health care, social assistance, public administration and construction make up the next largest employment sectors in the city (see **Exhibit 33**).

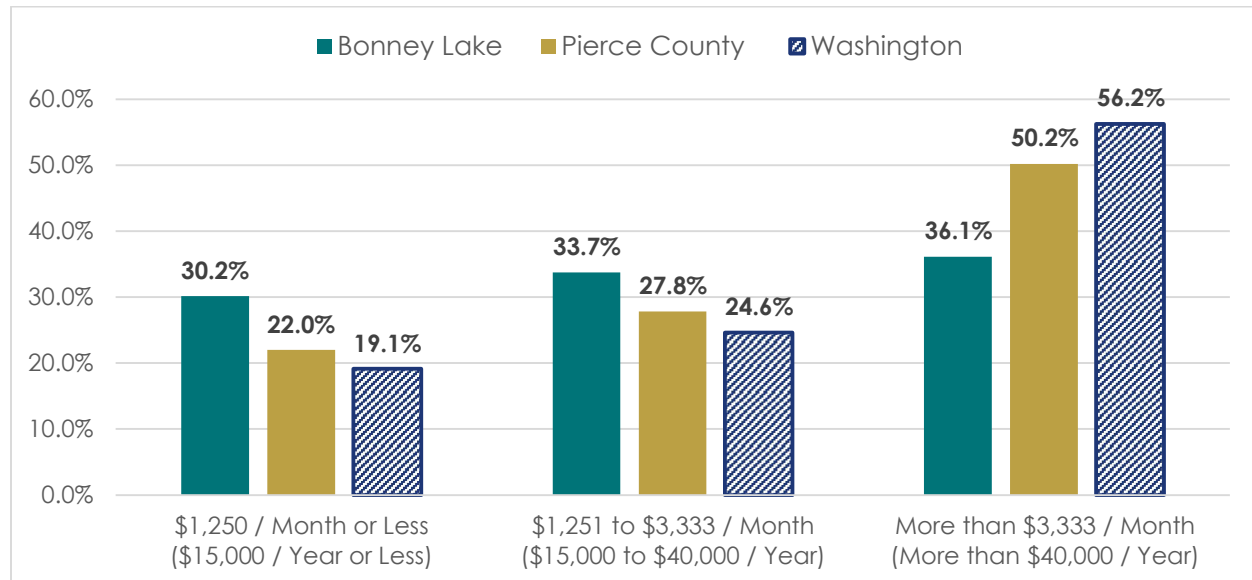
Exhibit 33: Worker Occupation by NAICS Industry Class and Sector, Bonney Lake, 2020

NAICS Code	NAICS Description	Worker Occupation
Goods Producing		
23	Construction	6.5%
11	Agriculture, Forestry, Fishing and Hunting	0.3%
31 – 33	Manufacturing	0.3%
21	Mining, Quarrying, and Oil and Gas Extraction	0.1%
Trade, Transportation and Utilities		
44 – 45	Retail Trade	36.2%
42	Wholesale Trade	3.2%
48 – 49	Transportation and Warehousing	1.2%
22	Utilities	0.0%
All Other Services		
72	Accommodation and Food Services	19.6%
62	Health Care and Social Assistance	10.0%
92	Public Administration	6.9%
81	Other Services (excluding Public Administration)	4.9%
54	Professional, Scientific, and Technical Services	2.7%
56	Administration & Support, Waste Management and Remediation	2.6%
52	Finance and Insurance	2.2%
61	Educational Services	1.5%
71	Arts, Entertainment, and Recreation	0.6%
53	Real Estate and Rental and Leasing	0.6%
51	Information	0.5%
55	Management of Companies and Enterprises	0.0%

Source: LEHD OnTheMap, Bonney Lake, 2020

Due to the City's high concentration of retail and service employment, which are typically minimum wage jobs, the monthly wages of workers employed in Bonney Lake are lower than for Pierce County or Washington State (see **Exhibit 34**).

Exhibit 34: Monthly Wages in Bonney Lake, Pierce County, and Washington State, 2020



Source: US Census Longitudinal Employer-Household Dynamics (LEHD) OnTheMap, Bonney Lake, Pierce County, and Washington State, 2020

The lower average wages means that some individuals employed in Bonney Lake do not meet the Self-Sufficiency Standard. The Self-Sufficiency Standard is the amount of annual income required to meet basic needs differentiated by family type and location without the help from public subsidies (e.g. public housing/housing assistances, Medicaid, SNAP/WIC, childcare assistance) or private/informal assistance (e.g. unpaid babysitting by a relative or friend, food from food banks, or shared housing). In 2020, the minimum hourly wage needed to meet the Self-Sufficiency Standard for cities in west Pierce County was \$21.54 - \$24.07⁴⁴, depending on family type, well over the State's minimum wage of \$13.50 per hour that same year (see **Exhibit 35**).

Exhibit 35: Self-Sufficiency Standard for West Pierce County Cities by Family Type, 2020

	1 Adult	1 Adult 1 Preschooler	1 Adult 1 Preschooler 1 School-Age	2 Adults 1 Preschooler 1 School-Age
Annual Income	\$26,610	\$50,480	\$59,612	\$67,909

Source: Diana Pearce, University of Washington, The Self-Sufficiency Standard for Washington State, 2020

⁴⁴ University of Washington, Self-Sufficiency Standard: <https://selfsufficiencystandard.org/washington/>.

Resident Occupations

Employment opportunities near Bonney Lake are increasing as new industries locate in the Kent, Auburn, and Sumner Valleys. During the past four years many new industrial plants have located in Auburn and Kent, and major industrial employers in Sumner have increased their employment. This trend is continuing, and will affect population growth in Bonney Lake.

- Plan for Bonney Lake, Washington (1964)

While the wages for people employed within the City are lower than average in Pierce County, the household median income of households living in Bonney Lake is \$108,705, which is significantly higher than the median household income in Pierce County, which is \$85,866⁴⁵. This high average household income is due to the number of residents employed outside of the City.

Exhibit 36 provides the percentage of residents employed in each of the major North American Industry Classification System (NAICS) sectors. Resident occupations show more even distribution across sectors than worker occupations, with residents primarily working in health care, construction, retail, manufacturing or education.

Exhibit 36: Resident Occupation by NAICS Industry Class and Sector, Bonney Lake, 2020

NAICS Code	NAICS Description	Resident Occupation
Goods Producing		
23	Construction	11.6%
31 – 33	Manufacturing	9.6%
11	Agriculture, Forestry, Fishing and Hunting	0.6%
21	Mining, Quarrying, and Oil and Gas Extraction	0.1%
Trade, Transportation and Utilities		
44 – 45	Retail Trade	11.6%
48 – 49	Transportation and Warehousing	6.6%
42	Wholesale Trade	5.3%
22	Utilities	0.4%
All Other Services		
62	Health Care and Social Assistance	12.5%
61	Educational Services	8.3%
72	Accommodation and Food Services	6.2%

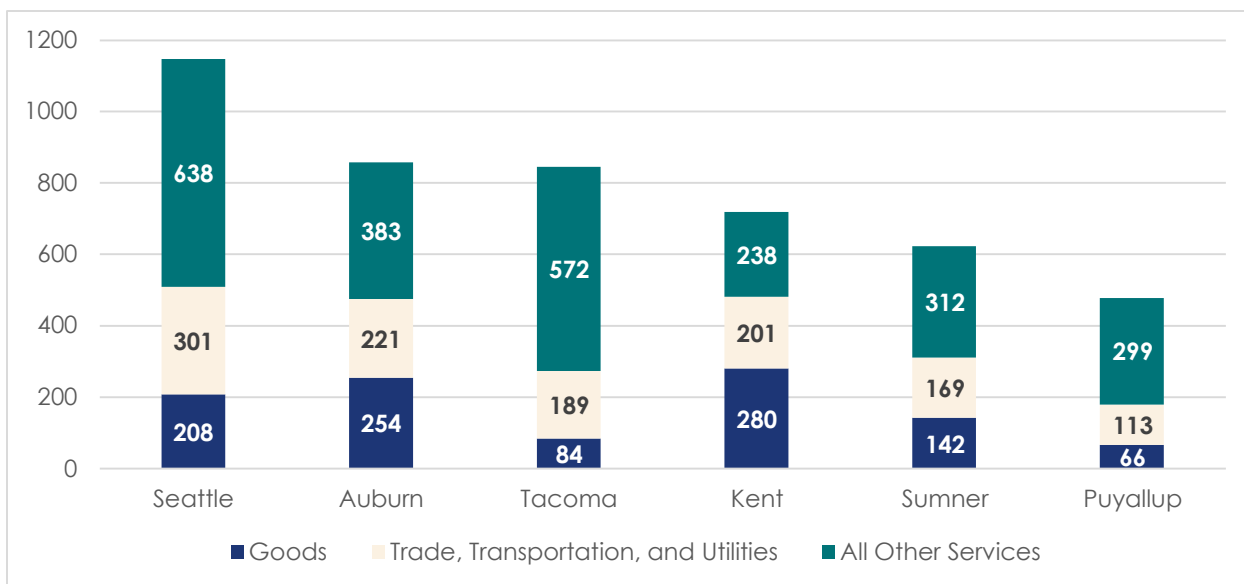
⁴⁵ Source: ACS Table S1901, Bonney Lake and Pierce County, 2021

NAICS Code	NAICS Description	Resident Occupation
92	Public Administration	5.4%
56	Administration & Support, Waste Management and Remediation	4.9%
54	Professional, Scientific, and Technical Services	4.9%
52	Finance and Insurance	2.7%
81	Other Services (excluding Public Administration)	2.6%
51	Information	2.2%
71	Arts, Entertainment, and Recreation	1.8%
53	Real Estate and Rental and Leasing	1.5%
55	Management of Companies and Enterprises	1.4%

Source: LEHD OnTheMap, Bonney Lake, 2020

Residents primarily commute outside of the city for work, with almost half commuting to Seattle, Auburn, Tacoma, Kent, Sumner and Puyallup (see **Exhibit 37**).

Exhibit 37: Top Commute Locations for Residents by NAICS Industry Segment⁴⁹, Bonney Lake, 2020



Source: LEHD OnTheMap, Bonney Lake, 2020

⁴⁹ The 2-digit NAICS codes associated with each industry class are as follows: Goods Producing includes NAICS 11, 21, 23, and 31-33, Trade Transportation and Utilities includes NAICS 42, 44-45, 48-49, and 22, and All Other Services includes the remaining twelve 2-digit NAICS industry sectors.

The City's quality of life will be important to continue to attract individuals employed in these regional industry clusters to live in Bonney Lake. Quality of life is a concept often used to describe an individual's or group's satisfaction with a residential location based on number of factors, which can include traffic, crime, availability of open space and parks, quality of local public schools, job opportunities, and housing affordability.

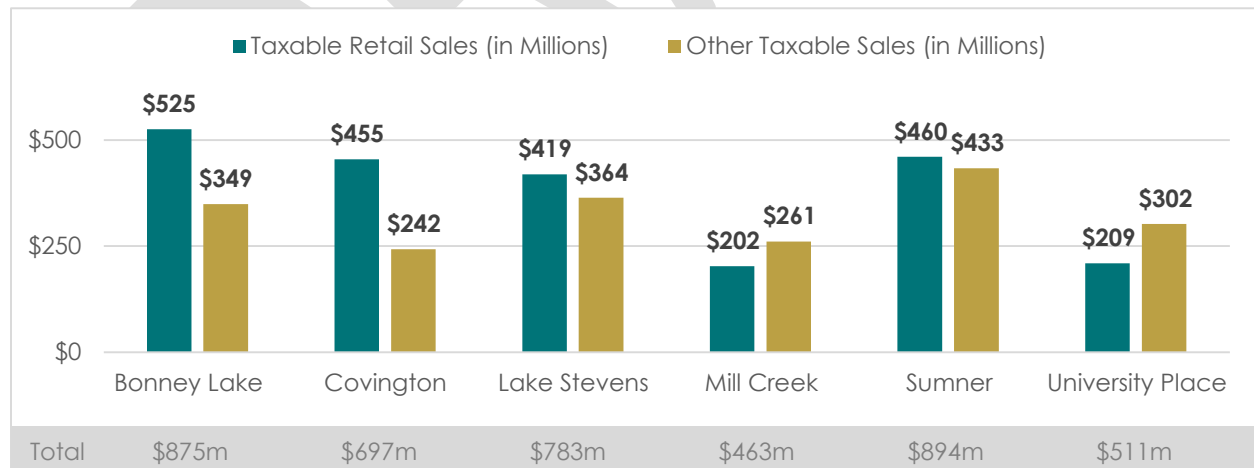
As residents are the main driver behind Bonney Lake's large retail sector and its overall economic development, maintaining a high quality of life is important for future economic development planning. To help maintain and enhance Bonney Lake's quality of life, the following are priorities for the City to make continued investments⁵⁶:

- Traffic mobility;
- Recreational amenities including parks and trails;
- Creating a city or civic center; and
- Improving the look and feel of the SR 410 retail corridor.

Taxable Revenues

Key indicators of the economic health and vitality of the jurisdiction's tax base is the total amount collected and diversity of those taxable revenues⁵⁸. Bonney Lake's total taxable sales in 2023 was 31% higher than the average of comparable cities⁵⁹ (see **Exhibit 38**).

Exhibit 38: Taxable Sales, Bonney Lake and Comparable Cities, 2023



Source: Washington State Department of Revenue, Taxable Retail Sales by City Calendar Year, 2023

⁵⁶ BERK Consulting Inc. (January 2015). *City of Bonney Lake Economic Development Study – Final Report*.

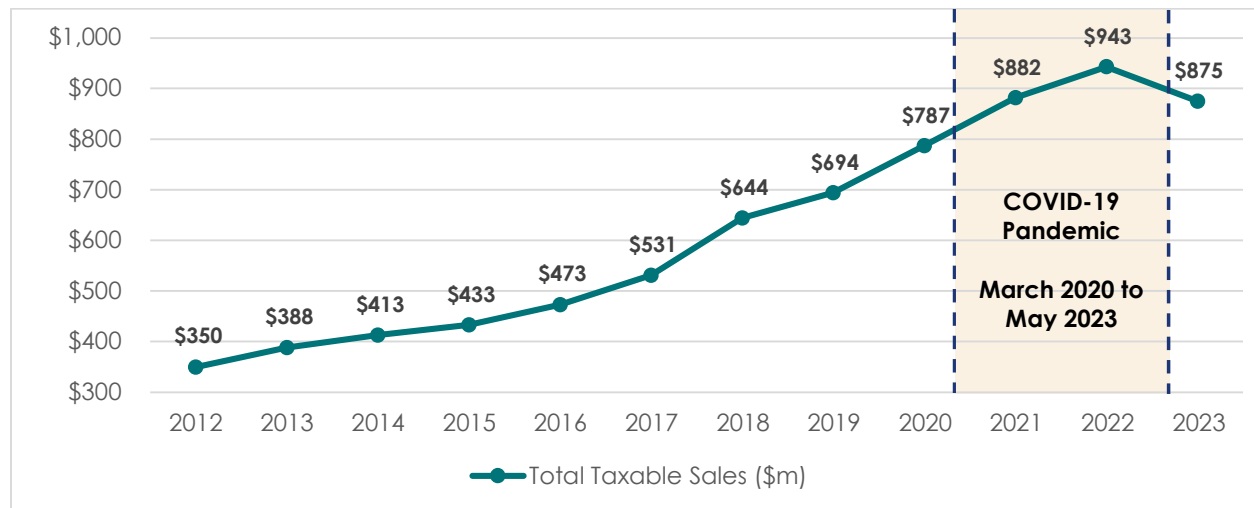
⁵⁸ Total taxable revenue is the total revenue collected by a business on which sales taxes are paid. The total sales tax collection is the local tax rate multiplied by the total taxable revenue.

⁵⁹ Comparable cities are jurisdictions similar to Bonney Lake based on six criteria, described in the Introduction Element.

The City's total taxable sales increased 150% between 2012 and 2023 (see **Exhibit 39**). This increase is likely due to:

- Completion of several large commercial developments in Midtown;
- An increase in the number of housing units and population; and
- Increased use of delivery services during the COVID-19 pandemic, and to a lesser extent, after the pandemic⁶⁰.

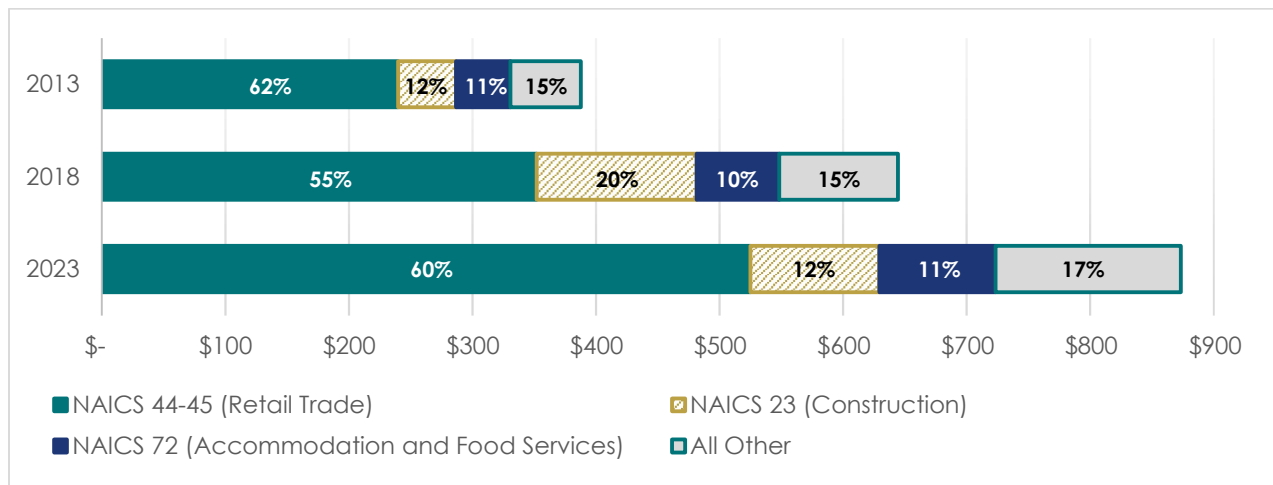
Exhibit 39: Total Taxable Sales in Millions, Bonney Lake, 2012 – 2023



Source: Washington State Department of Revenue, Taxable Retail Sales by City Calendar Year, 2012 – 2023

Bonney Lake's total taxable sales are primarily from three NAICS Sectors: Retail Trade (NAICS 44-45), Construction (NAICS 23), and Accommodation and Food Services (NAICS 72). Between 2013 and 2023, the volume of taxable sales more than doubled, however the proportion of these three sectors stayed relatively steady (see **Exhibit 40**). Warehouse clubs, home centers, full-service and limited-service restaurants are consistently in the top five industries generating sales tax in the city (see **Exhibit 41**).

⁶⁰ X. Wang, W. Kim, J. Holguín-Veras, and J. Schmid. *Adoption of delivery services in light of the COVID pandemic: Who and how long?*, Transportation Research Part A: Policy and Practice. Volume 154, 2021 (pages 270-286).

Exhibit 40: Taxable Sales by NAICS Sector, Bonney Lake, 2013, 2018, and 2023

Source: Washington State Department of Revenue, Taxable Retail Sales by City by NAICS Grouping, 2013, 2018, and 2023⁶²

Exhibit 41: Top 5 NAICS Industries, Bonney Lake, 2013, 2018, and 2023

Rank	NAICS	Industry Name	2023 Total Sales \$ / %	2018 Total Sales \$ / %	2013 Total Sales \$ / %
1	452311	Warehouse Clubs & Supercenters	\$232m / 27%	\$150m / 23%	\$72m / 18%
2	444110	Home Centers	\$88m / 10%	\$68m / 11%	\$43m / 11%
3	459999	All Other Miscellaneous Retailers ⁶³	\$48m / 6%		
	236220	Commercial & Institutional Building Construction		\$47m / 7%	
	452112	News Dealers & Newsstands ⁶⁴			\$29m / 8%
4	722511	Full-Service Restaurants	\$42m / 5%	\$29m / 4%	\$19m / 5%
5	722513	Limited-Service Restaurants	\$37m / 4%	\$27m / 5%	\$10m / 5%
Total Taxable Sales from Top 5:			\$447m / 51%	\$322m / 50%	\$180m / 46%

Source: Washington State Department of Revenue, Taxable Retail Sales by City by NAICS Grouping, 2013, 2018, and 2023

⁶² Available online at:

<https://apps.dor.wa.gov/ResearchStats/Content/TaxableRetailSalesLocal/Report.aspx>

⁶³ Top businesses by annual sales for NAICS 459999 include Amazon, QVC, Ebay, Wayfair, etc. See description at: <https://www.census.gov/naics/?input=459999&year=2022&details=459999> and top businesses at: <https://www.naics.com/naics-code-description/?code=459999&v=2022>.

⁶⁴ The Courier Herald, a local newspaper, was previously located within the City limits.

Retail Surplus and Leakage

Retail demand is the volume of retail purchases local residents want to make. Those purchases can be made within the local trade area (the area where customers live and how far they are willing to travel to make a purchase) or elsewhere. Retail supply is the volume of retail sales local businesses can support.

In some communities, the volume of retail supply is higher than what residents want to purchase, creating a *retail surplus*. This means that a community's trade area is capturing the local market plus shoppers not living within the trade area. Having a retail surplus does not necessarily mean there is no room for new retailers, since communities can have clusters of destination retail stores that have an appeal to a larger geographic area than the local trade area.

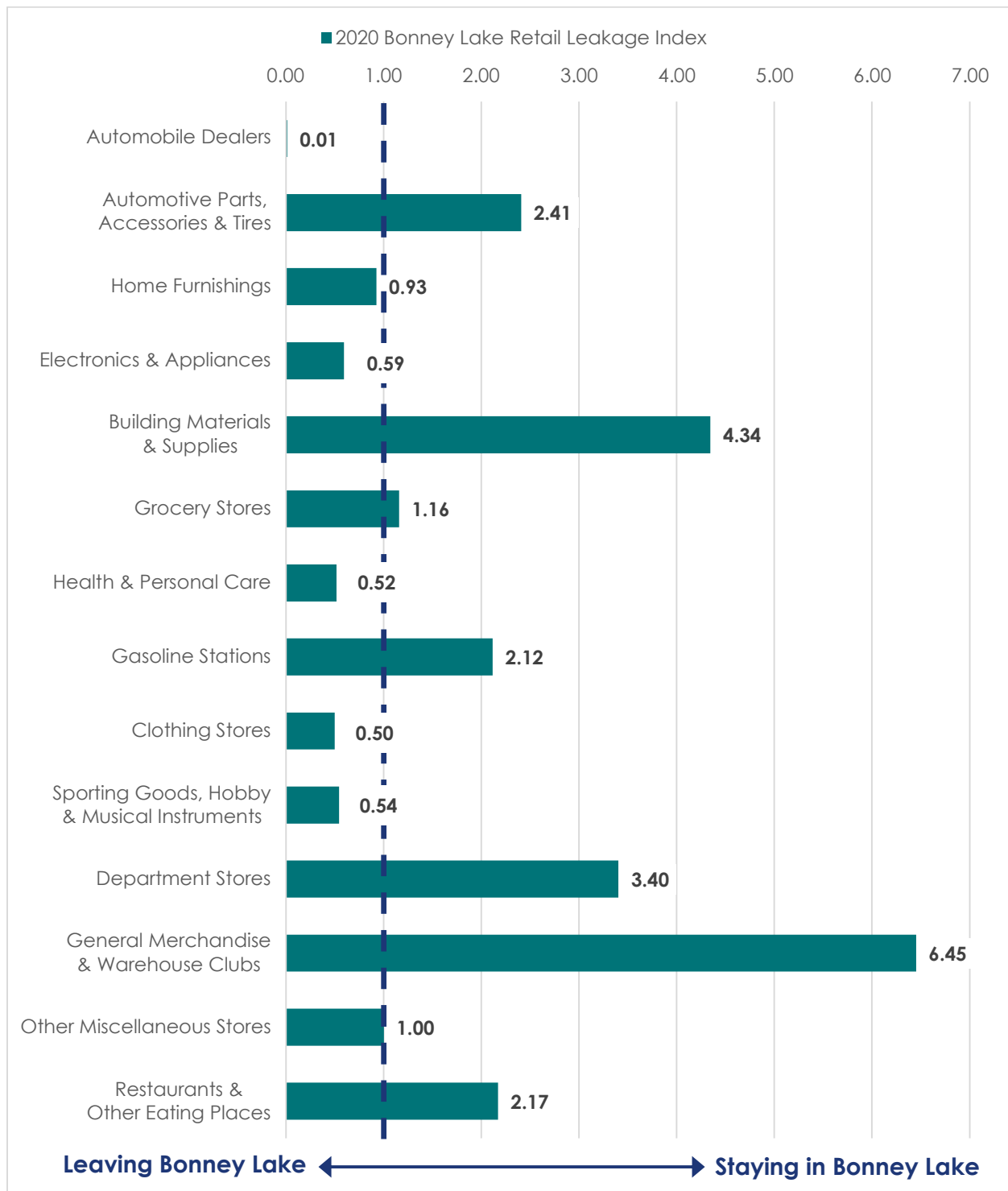
When demand outstrips supply, *retail leakage* occurs as residents travel outside of the local trade area to shop. Retail leakage can indicate either areas of unmet demand or the presence of strong competitor in a neighboring local trade area that dominates and captures that demand. For example, Puyallup and Sumner have a significant number of car dealerships that capture the demand from Bonney Lake's trade area, which translates into a retail leakage, but not necessarily unmet demand that the City could capitalize on to increase retail sales.

This retail surplus and retail leakage analysis examines the retail market for the City (see **Exhibit 42**) and the City's local trade area (see **Exhibit 43**) to identify possible retail opportunities. The Bonney Lake local trade area is larger than the incorporated boundaries of the City and contained approximately 100,600 people in 2020. The local trade area for this analysis is within the geographical area that is within a ten (10) minute drive of the intersection of 192nd Avenue East and State Route 410.

The City prepared a leakage index to identify leakages and surpluses for various retail and food service industries, based on the North American Industrial Classification System (NAICS). The Washington State Department of Revenue also uses the NAICS to report total retail sales for each category listed below.

To interpret the ratios in the leakage index:

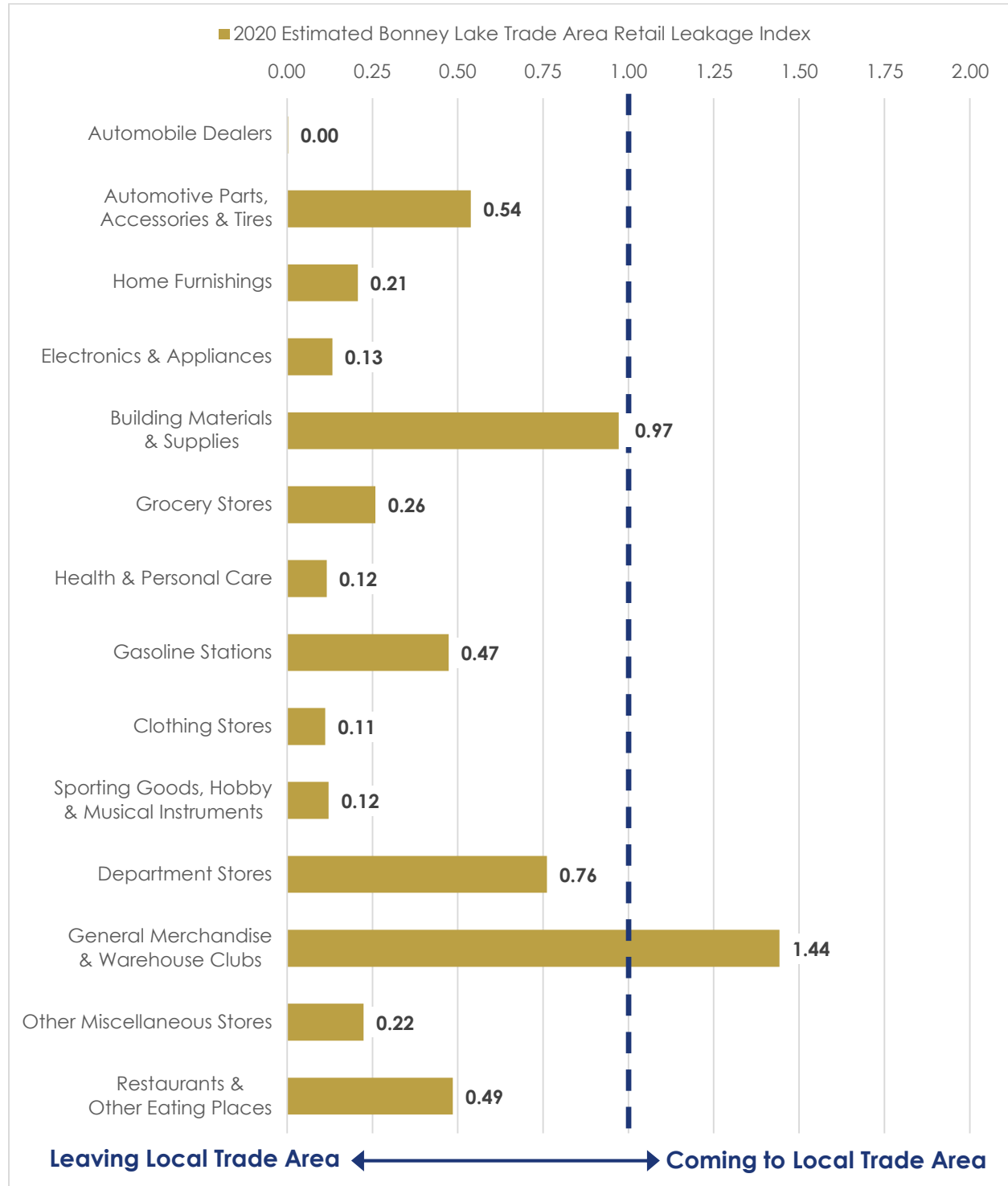
- A value of 1.00 means that the demand and sales are in balance.
- A value of 0.80 or less means that demand exceeds sales, indicating that consumers are leaving the trade area to make purchases.
- A value of 1.20 or greater means that sales exceed demand, which indicates that consumers are coming from outside the trade area to make purchases.

Exhibit 42: Retail Leakage Index, Bonney Lake, 2020

Sources: Washington State Department of Revenue, Taxable Retail Sales by NAICS Grouping, Bonney Lake and Washington State, 2020

2020 Census Population, Bonney Lake and Washington State, 2020

2017 NAICS Groupings

Exhibit 43: Retail Leakage Index, Estimated Bonney Lake Local Trade Area, 2020

Sources: Washington State Department of Revenue, Taxable Retail Sales by NAICS Grouping, Bonney Lake and Washington State, 2020
 2020 Census Population, Bonney Lake and Washington State, 2020
 2017 NAICS Groupings

Access to Child Care

As of 2021, Bonney Lake's largest population group was children 19 years and younger. Approximately 4,600 (72%) of this group is under the age of 14 and approximately 3,100 (49%) is under the age of 9. Bonney Lake has a number childcare facilities with varying capacities, including childcare provided by the Sumner-Bonney Lake School District (see **Exhibit 44**). These facilities serve less than 20% of the population under the age of 14 and indicate of deficit of available child care in Bonney Lake.

Pierce County is estimated to have a gap of over 20,000 childcare slots (over 50% of available supply), with estimated economic losses attributed to households, businesses, and general tax losses in Pierce County of \$993 million annually⁶⁶.

Exhibit 44: Child Care Facilities, Bonney Lake, 2024

Facility	Ages Served				Total Capacity
	0-12 Months	1-2.5 Years	2.5-6 Years	6-13 Years	
Kids Country	X	X	X	X	160
Global Minds		X	X	X	33
Bonney Lake Montessori			X	X	29
KinderCare	X	X	X		111
Right at School (Bonney Lake Elementary)				X	60
Right at School (Emerald Hills Elementary)				X	60
Right at School (Victor Falls Elementary)				X	60
Panther Cubs Learning Center	X	X	X		42

Source: Washington State Department of Children, Youth, and Families. Available online at: <https://www.findchildcarewa.org/>

4.3 EMPLOYMENT GROWTH

The GMA requires Pierce County and its cities to evaluate development (land consumption) over time to determine whether the adopted urban growth areas and zoning density provide land capacity sufficient to accommodate the adopted population and employment projections.

⁶⁶ Bipartisan Policy Center, Child Care Gaps Assessment (2020). Available online at: <https://childcaregap.org/>

Employment Growth Allocation

Pierce County adopted employment growth targets for 2044 under Pierce County Ordinance No. 2022-46s^{30, 31} (see **Exhibit 45**).

Exhibit 45: Employment Allocation, Bonney Lake, 2020 – 2049

	2020	2044		2049 ⁶⁷	
	Estimated Existing Employment	Employment Growth Allocation	Total Employment Target	Planning Horizon	Total Employment Target
Pierce County Adopted Target / Land Capacity Analysis Assumption	6,365	1,717	8,082	412	8,494

Source: Adapted from Pierce County Ordinance No. 2022-46s and the Bonney Lake Land Capacity Analysis

Land Capacity Analysis

The Land Capacity Analysis⁶⁸ (LCA) evaluated existing zoning designations and whether there was adequate capacity to support future growth. Based on that analysis, the City completed a Growth Alternatives Memo⁶⁹ to evaluate potential zoning scenarios that would accommodate the adopted employment target. On April 23, 2024, City Council moved to identify *Alternative 2: Bend the Trend*, as the Council's preferred growth alternative (Motion No. M24-33). This alternative anticipates a surplus of employment capacity through 2044 (see **Exhibit 46**).

Exhibit 46: Employment Capacity Summary, Bonney Lake, 2020 – 2044

	Estimated Employment Growth 2020-2023	Total Pipeline Employment Capacity	Remaining Zoned Employment Capacity ⁷⁰	Total Employment Capacity	Employment Capacity Surplus or Deficit	
					2044	2049
Total Capacity	504	684	1,235	2,423	706	294

Source: Adapted from Bonney Lake Growth Alternatives Memo

⁶⁷ The average annual growth rate was extended at a constant rate to establish an estimated total target for the 2049 planning horizon. This is an assumption to assist in making growth related decision for various City utilities and services and to coincide with the centennial of the City.

⁶⁸ See **Appendix TBD**.

⁶⁹ See **Appendix TBD**.

⁷⁰ **Total zoned capacity** is the capacity for additional jobs from vacant, underutilized, and developable land, minus displaced jobs from underutilized land.

4.4 BUSINESS CLIMATE

Every year there is a limited pool of money that spent in Central Puget Sound Region and Pierce County by businesses either to expand current operations or to enter a new market. Local jurisdictions do not control when this spending occurs but can control whether the conditions are favorable to businesses through clear policies, development regulations, and availability of infrastructure and services. For Bonney Lake, this means that the City competes with other communities in the Central Puget Sound Region and Pierce County to attract businesses that provide jobs for residents, as well as to recruit businesses that offer goods and services needed and desired by the community.

A local jurisdiction cannot fully control several of the factors used by business to determine where to invest (e.g. the availability of skilled workers, location of a City in relationship to the regional transportation systems, or the number of residents meeting certain demographic criteria). However, a jurisdiction can help to attract new business and retain existing business by creating a positive business climate by:

- Providing quality public services and facilities.
- Ensuring the development review process is reasonable and predictable, and that the cost for development (e.g. permit fees, impact fees, connection charges, taxes, etc.) is proportionate to the benefit received by the business and community.
- Building the social capital of existing business by facilitating interactions between businesses by supporting organizations like the Bonney Lake Chamber of Commerce and Beautify Bonney Lake.

A positive economic climate requires sustained efforts by numerous parties. Many factors are beyond the City's control, such as the educational resources allocated by the Sumner School District, or the housing investment decisions made by the private sector. Additionally, by virtue of being an incorporated city in Pierce County, the City is included in a variety of countywide and regional economic development efforts, including those of the Puget Sound Regional Council, Prosperity Partnership, the Pierce County Regional Council, the Port of Tacoma, the Economic Development Board of Tacoma-Pierce County, and the Pierce County Economic Development Division.

When the factors within and beyond the control of the City align, Bonney Lake has a powerful advantage in the marketplace. Bonney Lake must take a facilitative approach to encouraging business investment, study options for development fees, and communicate the City's interest in business growth. This will help to ensure that when there is an opportunity for investment between similar communities in the area; Bonney Lake will be the preferred location.

4.5 INFRASTRUCTURE DEVELOPMENT

One of the City's other critical economic development roles is to plan, design, and build the infrastructure that support the City's continued development. By adopting and investing in the necessary infrastructure to support the desired land uses, the City lays the foundation upon which development can occur.

Bonney Lake updates its Capital Improvement Plan on a regular basis, and thus is able to respond to changing development pressures and needs. This allows the City to grow thoughtfully, to meet the needs of both existing neighborhoods and new development.

Likewise, the City encourages the deployment of private sector infrastructure, such as telephone, electricity, and natural gas distribution systems, to meet the needs of development. When new infrastructure needs emerge, such as broadband and wireless communication systems, the City encourages the extension of these services to residences and businesses.

As areas mature and market conditions change, new challenges and opportunities arise, and the City undertakes planning activities to help areas adjust. By doing this basic task well, Bonney Lake is able to ensure infrastructure improvements will attract and retain the desired economic development, while protecting neighborhoods from the impacts of unplanned growth.

One of the biggest infrastructure issues that the City must address, in addition to water and sewer service, is the transportation network. This is especially true for SR 410, which serves as both the primary thoroughfare and artery into and out of Bonney Lake and as the main commercial and retail corridor for the City and plateau. There are few alternative routes to travel in and out of Bonney Lake with limited public transit service. With the majority of residents commuting to and from Bonney Lake for work, the current traffic loads on SR 410 will only increase as population on the plateau continues to grow in the future and could negatively affect Bonney Lake's residential quality of life, attractiveness to new businesses, and overall economic development.

4.6 ECONOMIC VITALITY GOALS AND POLICIES

The policies in this section identify actions the City should consider over the upcoming planning period to achieve the stated goals.

Goal CD-EV-1: Expand socio-economic opportunity for the citizens of Bonney Lake.

- Policies:**
- CD-EV-1.1** Recruit business enterprises that will provide residents with employment wages at or above county median income levels.
 - CD-EV-1.2** Encourage institutions of higher education to create online or satellite educational and training programs that are readily available to Bonney Lake citizens, or within reasonable commuting distance.
 - CD-EV-1.3** Work with other public agencies and private interests, including the Tacoma-Pierce County Economic Development Board (EDB), Sumner and White River School Districts, Chamber of Commerce, and others to promote employment and occupational training and advancement programs and job placement skills.
 - CD-EV-1.4** Work with other public agencies and private interests to promote daycare services and facilities for pre-school children, before and after school latchkey children, and special populations including elderly and handicapped adults to support working household members.
 - CD-EV-1.5** Work with other public agencies and private interests to create interactive and linked websites listing employment opportunities.
 - CD-EV-1.6** Identify and encourage programs that will reduce the gap between wages paid and the Self Sufficiency Standard.
 - CD-EV-1.7** Enhance access to quality childcare through programs that are compatible with households' economic resources and supported by public and private resources.

Goal CD-EV-2: Enhance and maintain Bonney Lake's residential quality of life as an economic development strategy, capitalizing on Bonney Lake's affordability, recreational amenities, and scenic resources to attract people to live and work within the City.

- Policies:**
- CD-EV-2.1** Promote the proximity of Lake Tapps, Crystal Mountain, and Mount Rainier as part of business recruitment and marketing efforts.

- CD-EV-2.2** Maintain and increase City investment in public amenities that contribute to high quality of life for Bonney Lake residents, including parks, public spaces, civic gathering places, sidewalks and streetscapes.
- CD-EV-2.3** Utilize design guidelines to improve the City's physical environment and make the City an attractive destination.
- CD-EV-2.4** Develop a system of sidewalks, bicycle lanes and trails to provide pedestrian and bicycle connection between residential neighborhoods, parks, civic gathering spaces and centers.

Goal CD-EV-3: Strengthen Bonney Lake's role as a hub for regional retail, personal and professional services, and employment.

- Policies:**
- CD-EV-3.1** Promote Bonney Lake's role as a regional retail center and raise awareness of retail development opportunities to build upon or round out the City's economic strengths.
- CD-EV-3.2** Ensure that the City maintains sufficient land capacity to support continued expansion of Bonney Lake's retail base, as well as meet demand for professional and medical offices and other target sectors.
- CD-EV-3.3** Actively promote investment and business recruitment to strengthen Bonney Lake's position in sectors that have significant growth potential, such as professional services and medical office.
- CD-EV-3.4** Provide flexibility in land use plans and development regulations to allow the local business community to take advantage of new business trends and opportunities that are consistent with the City's economic development vision.

Goal CD-EV-4: The City will strive to have higher and technical educational opportunities available to all residents within Bonney Lake.

- Policies:**
- CD-EV-4.1** Build relationships with community colleges and technical colleges in order to develop a long-term strategy to locate a technical college, community college extension, or training programs within Bonney Lake.

Goal CD-EV-5: Establish a supportive climate that encourages the retention of existing businesses and encourages business investment in the community.

- Policies:**
- CD-EV-5.1** Promote economic development as a City priority, tied directly to the City's ability to serve residents and businesses well. Ensure City

staff members have appropriate understanding of the City's economic development interests and their individual roles in contributing.

- CD-EV-5.2** Promote a customer-service orientation in development services that facilitates development aligned with the community's vision and land use regulations.
- CD-EV-5.3** Clearly establish and communicate the community's vision for Bonney Lake as a whole, as well as for major sub-geographies, to provide the local business community with clear direction on the appropriateness of various types of development in different parts of the City.
- CD-EV-5.4** Ensure that taxes, fees, and dedications assessed as part of the development review process do not become an undue obstacle to economic growth.
- CD-EV-5.5** Enforce development regulations in a consistent, objective manner, encouraging and facilitating investment that adheres to these policies.
- CD-EV-5.6** Promote public understanding of the City's positive development climate and desire for business investment, both within the local business community and for the public.
- CD-EV-5.7** Consider the use of organizational and financial tools to leverage private sector resources in accomplishing the city's economic development and land use vision.
- CD-EV-5.8** Facilitate economic development in commercial areas through public/private partnerships if the activity is consistent with the city's adopted policies, if there is a compelling public benefit, and if there is an acceptable level of risk.

Goal CD-EV-6: Implement subarea plans for the Downtown, Midtown, and Easttown Centers to ensure a balanced mix of jobs and businesses and to enhance Bonney Lake's built environment.

- Policies:**
- CD-EV-6.1** Establish a regular review and update cycle for the Centers and Easttown Subarea Plans to keep these plans current with emerging economic trends and changing development conditions in Bonney Lake.
 - CD-EV-6.2** Ensure the vision statements of the Centers and Easttown Subarea Plans each promote a particular mix of businesses and define land uses that are most appropriate and desirable for each subarea.

- CD-EV-6.3** Ensure the policies and standards of the Centers and Easttown Subarea Plans establish distinct identities for each subarea and for Bonney Lake as a whole.

Goal CD-EV-7: Provide well-planned, maintained, and high-quality public infrastructure that supports business and community growth.

- Policies:**
- CD-EV-7.1** Coordinate with the Washington Department of Transportation (WSDOT) and Pierce County to plan for access improvements and infrastructure maintenance in the SR 410 corridor and surrounding area.
- CD-EV-7.2** Partner with local businesses to identify infrastructure conditions that pose obstacles to economic growth.
- CD-EV-7.3** Maintain updated plans for water, sewer, stormwater, and transportation infrastructure to ensure that the facilities necessary to serve desired commercial growth are in place.

5. PROPERTY RIGHTS

5.1 ABOUT TAKINGS

The Fifth Amendment to the United States Constitution provides that private property shall not be taken for public use without just compensation. Article 1, section 16 of the Washington State Constitution provides that “[n]o private property shall be taken except for public purposes within its constitutional authority and only upon payment of just compensation.”

The Washington Growth Management Act (GMA) plays a significant role in balancing property rights with the state's goals for sustainable development, efficient land use, and environmental protection. The GMA recognizes that property owners have the right to use and develop their land in accordance with applicable zoning and land use regulations, subject to certain limitations to protect public health, safety, and welfare. While property rights are respected, the GMA recognizes that land use decisions have broader implications for the public interest, including the need to manage growth, protect natural resources, and promote livable communities. Local governments are required to balance the interests of property owners with the goals of the GMA.

The State of Washington Office of the Attorney General published guidance⁷¹ to help local jurisdictions avoid violating property rights. In it, the Attorney General states that:

State governments have the authority and responsibility to protect the public health, safety, and welfare. This authority is an inherent attribute of state governmental sovereignty and is shared with local governments in Washington under the state constitution. Pursuant to that authority, which is called the “police power,” the government has the ability to regulate or limit the use of property.

Police power actions undertaken by the government may involve the abatement of public nuisances, the termination of illegal activities, and the establishment of building codes, safety standards, and sanitary requirements. Government does not have to wait to act until a problem has actually manifested itself. It may anticipate problems and establish conditions or requirements limiting uses of property that may have adverse impacts on public health, safety, and welfare.

Sometimes the exercise of government police powers takes the form of limitations on the use of private property. Those limitations may be imposed through general land use planning mechanisms such as zoning ordinances, development regulations, setback requirements, environmental regulations, and other similar regulatory limitations. Regulatory activity may also involve the

⁷¹ Available online at: <https://www.atg.wa.gov/avoiding-unconstitutional-takings-private-property>

use of permit conditions that dedicate a portion of the property to mitigate identifiable impacts associated with some proposed use of private property..

- Advisory Memorandum and Recommended Process for Evaluation of Proposed Regulatory or Administrative Actions to Avoid Unconstitutional Takings of Private Property (September 2018)

5.2 PROPERTY RIGHTS GOALS AND POLICIES

The policies in this section identify actions the City should consider over the upcoming planning period to achieve the stated goals.

Goal CD-PR-1: Protect the property rights of landowners.

- Policies:**
- CD-PR-1.1** All private property and private property rights of Bonney Lake residents shall be fully protected under the Fifth and Fourteenth Amendments of the United States Constitution and the United States Civil Rights Act.
 - CD-PR-1.2** Balance the responsibility to protect the community from the impacts associated with new residential and commercial development with the responsibility to protect property rights.
 - CD-PR-1.3** Build into the regulatory framework procedures for avoiding takings, such as variances or exemptions.
 - CD-PR-1.4** Continue working to streamline the permitting process utilizing LEAN principals in order to efficiently process permit applications.
 - CD-PR-1.5** Private property shall not be taken for public use without just compensation having been made. The property rights of landowners shall be protected from arbitrary and discriminatory actions.

Goal CD-PR-2: Provide property owners the opportunity to participate in local decision-making when the decisions affect their lives and property.

- Policies:**
- CD-PR-2.1** The following rights shall be considered in decision-making: (1) The right of a property owner to physically possess and control their interests in property, including easements, leases, or mineral rights. (2) The right of a property owner to use, maintain, develop, and improve his or her property for personal use or for the use of any other person, subject to state law and local ordinances. (3) The right of the property owner to privacy and to exclude others from

the property to protect the owner's possessions and property. (4)
The right of a property owner to dispose of his or her property through sale or gift.

- CD-PR-2.2** Persons within 300-feet of site specific quasi-judicial and legislative action have the right to notice of public hearing(s) and participate in land use and zoning decisions of the City.
- CD-PR-2.3** The City will ensure that its land development regulations provide adequate public notice of proposed changes to the comprehensive plan, and zoning changes to afford affected persons with sufficient time to become informed and participate in the decision-making process.
- CD-PR-2.4** The City will consider implementing and maintaining processes to better inform the public of proposed changes to the comprehensive plan and zoning regulations.

6. LAND USE

Develop Bonney Lake as a balanced community, maintaining and enhancing the existing single family residential 'bedroom' character with a thoughtful blending of desired economic activities and higher density residences.

- Bonney Lake Comprehensive Plan (1985)

6.1 PLANNING FOR LAND USE

Growth Management Act

This Land Use Sub-Element has been prepared to comply with the GMA, consistent with RCW 36.70A.070(10). At a minimum, this Sub-Element must contain:

- The proposed distribution and location of land uses, including (where appropriate), land designated for agriculture, timber production, housing, commerce, industry, recreation, open spaces, general aviation airports, public utilities, public facilities, and other land uses;
- Population densities, building intensities, and future population estimates;
- Protection of the quality and quantity of groundwater used for public water supplies (see the **Community Services and Facilities Element**); and
- Review drainage, flooding, and stormwater runoff in the area and provide guidance for corrective actions to mitigate or cleanse those discharges (see the **Community Services and Facilities Element** and the **Environmental Stewardship Element**); and

As described in **Section 1.1: Regulatory Context**, this Sub-Element must also be consistent with adopted multi-county planning policies (MPPs) and county-wide planning policies (CPPs).

In 2023, the Washington State Legislature passed a major update to the requirements of the Land Use Element (E2SHB 1181)⁷², which expanded the minimum requirements for this element related to environmental justice, promoting physical activity, reducing per capita vehicle miles traveled, and reducing risk associated with wildfire. These changes are not required to be completed until funded by the state and may be completed as part of a future update.

⁷² Available online at: <https://lawfilesexternal.wa.gov/biennium/2023-24/Pdf/Bills/Session%20Laws/House/1181-S2.SL.pdf>

Multi-County Planning Policies (MPPs)

As part of the VISION 2050 update, PSRC changed how jurisdictions are categorized based on their size, function, and access to transit options. Bonney Lake is in the “Cities and Towns” category, described as follows:

Cities and Towns are expected to accommodate relatively less growth than historical trends and remain relatively stable for the long term. Many Cities and Towns are served by local transit options, but these jurisdictions are not connected to the regional high-capacity transit system. Some may not be served by scheduled fixed-route transit or be within a transit service district. Their locally-designated city or town centers provide local job, service, cultural, and housing areas for their communities. These local centers should be identified in local comprehensive plans and become priority areas for future investments and growth at the local level.

... Free-standing cities and towns are separated from the contiguous urban growth area and should serve as hubs for relatively higher-density housing choices and as job and service centers for surrounding rural areas. These cities should be the focal points of rural-based industries and commerce and the location of schools and other institutions serving rural populations. Due to their physical isolation from the rest of the designated urban growth area, they will likely receive a lesser overall share of growth and are not expected to grow as much as cities and towns in the contiguous urban growth area.

- VISION 2050, Regional Growth Strategy (2020)

This Land Use Sub-Element must be consistent with VISION 2050 in the following areas:

- **Regional Growth Strategy:** Achieve a development pattern that aligns with Vision 2050, reduces rural growth rates, and focuses growth in cities.
- **Jobs-Housing Balance:** Providing housing options with nearby jobs, to reduce the length of commute travel and number of vehicle trips.
- **Growth Targets:** Ensure consistency between city and county adopted growth targets.

County-Wide Planning Policies (CPPs)

Pierce County adopted updated CPPs in 2022. This Land Use Sub-Element is required to be coordinated and consistent with the CPPs in the following areas:

- **Buildable Lands:** Contribute to the development, monitoring, and evaluation of the Buildable Lands Program.
- **Countywide Growth Centers:** Maintain consistency with the standards for Countywide Growth Centers in Downtown Bonney Lake.
- **Community and Urban Design:** Plan and shape the built environment in a way that maintains the interests and objectives of the community.

- **Essential Public Facilities:** Allow for the siting of Essential Public Facilities in compliance with State law.
- **Growth Targets:** Conform with the Regional Growth Strategy envisioned by VISION 2050 and allocated through the Pierce County growth target process.
- **Healthy Community Planning:** Consider how the design and development of communities can impact the physical, social, and mental health of residents.
- **Historic, Archaeological, and Cultural Preservation:** Preserve historic and cultural resources as assets for the future where possible, and establish a meaningful consultation process with local, Federally recognized tribes.

6.2 LAND USE PROFILE

Bonney Lake's land use pattern is defined by the City's topography, recreational past, transportation network, and location in one of the nation's largest metropolitan areas. When the City incorporated in 1949, it was developed primarily as a bedroom community, with residents commuting to the north and west for work. Situated on an undulating plateau located between the Puyallup River Valley and the Carbon River Valley, Bonney Lake is framed by the shores of Lake Tapps to the north. Fennel Creek and its associated wetlands divide the north and west portions of Bonney Lake from the south and east portion. Geographically, the City encompasses almost 8.3 square miles (5,305 acres). **Exhibit 47** provides a breakdown of the different land uses within Bonney Lake.

Exhibit 47: Land Area by Land Use, Bonney Lake, 2020

Land Use	Total Acres	% of Total
Commercial and Industrial	417.6	7.9%
Finance, Insurance, and Real Estate	126.9	2.4%
Retail	169.1	3.2%
Mixed Use	35.8	0.7%
Manufacturing	4.1	0.1%
Warehousing and Utilities	81.6	1.5%
Residential	2,407.8	45.4%
Single-Unit	2,204.4	41.6%
Multi-Unit (2-4 Units)	37.3	0.7%
Multi-Unit (5+ Units)	27.0	0.5%
Mobile Home	98.0	1.8%
Retirement	6.2	0.1%
Other Residential	35.0	0.7%
Government and Open Space	848.5	16.0%
Education	184.0	3.5%

Land Use	Total Acres	% of Total
Government	17.0	0.3%
Open Space / Parks	557.2	10.5%
Resource Lands (Title 84 RCW)	90.4	1.7%
Vacant – Undeveloped or Not Associated with a Tax Parcel	1,631.1	30.7%
Vacant – Commercial	219.9	4.1%
Vacant – Other	454.0	8.6%
Vacant – Rights-of-Way or Not Associated with a Tax Parcel	957.2	18.0%

Source: Adapted from Pierce County Buildable Lands Report Data Spreadsheets (November 2022)

6.3 EXISTING DEVELOPMENT PATTERNS

The Town of Bonney Lake has been blessed with natural beauty, far beyond the scenery of other areas. Lake Tapps, and the other lakes within the Town, together with the hills that offer views of the valleys and the mountains give Bonney Lake natural amenities that are not found anywhere else in the Puget Sound Region. It is desired to protect these amenities as much as possible.

- *Plan for Bonney Lake, Washington (1964)*

Bonney Lake has been, is, and will remain primarily a residential community. The residential areas form the foundation of the community and are the physical and social expressions of community. The City is committed to preserving and strengthening these areas by:

- Protecting existing housing stock;
- Maintaining the physical quality of Bonney Lake's neighborhoods;
- Enhancing walkability; and
- Providing convenient access to shopping, services, open spaces, parks, civic facilities, and educational facilities.

While the City will continue to strengthen the fabric of these residential areas, Bonney Lake must also accommodate additional growth to meet City's mandatory population, housing and employment growth targets.

The elements of the built environment (e.g. high quality walkable neighborhoods, well-designed centers and multimodal corridors) facilitate formal and informal social interactions between the residents, workers, and visitors of Bonney Lake, which is crucial to building social capital between community members. This social capital is the glue that binds residents to Bonney Lake and each other fosters civic engagement and

volunteerism; and constitutes one of the defining elements in creating a community⁷⁵. Social capital has a positive association with the health of individuals within a community as people with more social capital, "... appear to have lower mortality rates and are less likely to report being in 'fair' or 'poor' health...." ⁷⁶.

Another important part of strengthening the City's identity is protecting the forested hillsides, the overall tree canopy, Lake Tapps, Fennel Creek, and the views of Mount Rainier, the Cascades Mountains, and the Olympic Mountains through a continued commitment to open space preservation and conservation of natural resources.

To meet the growth targets and develop a balanced community that maintains the existing residential areas while providing for increased economic activities and higher-density residential areas, the City should be developed based on the following priorities.

Centers

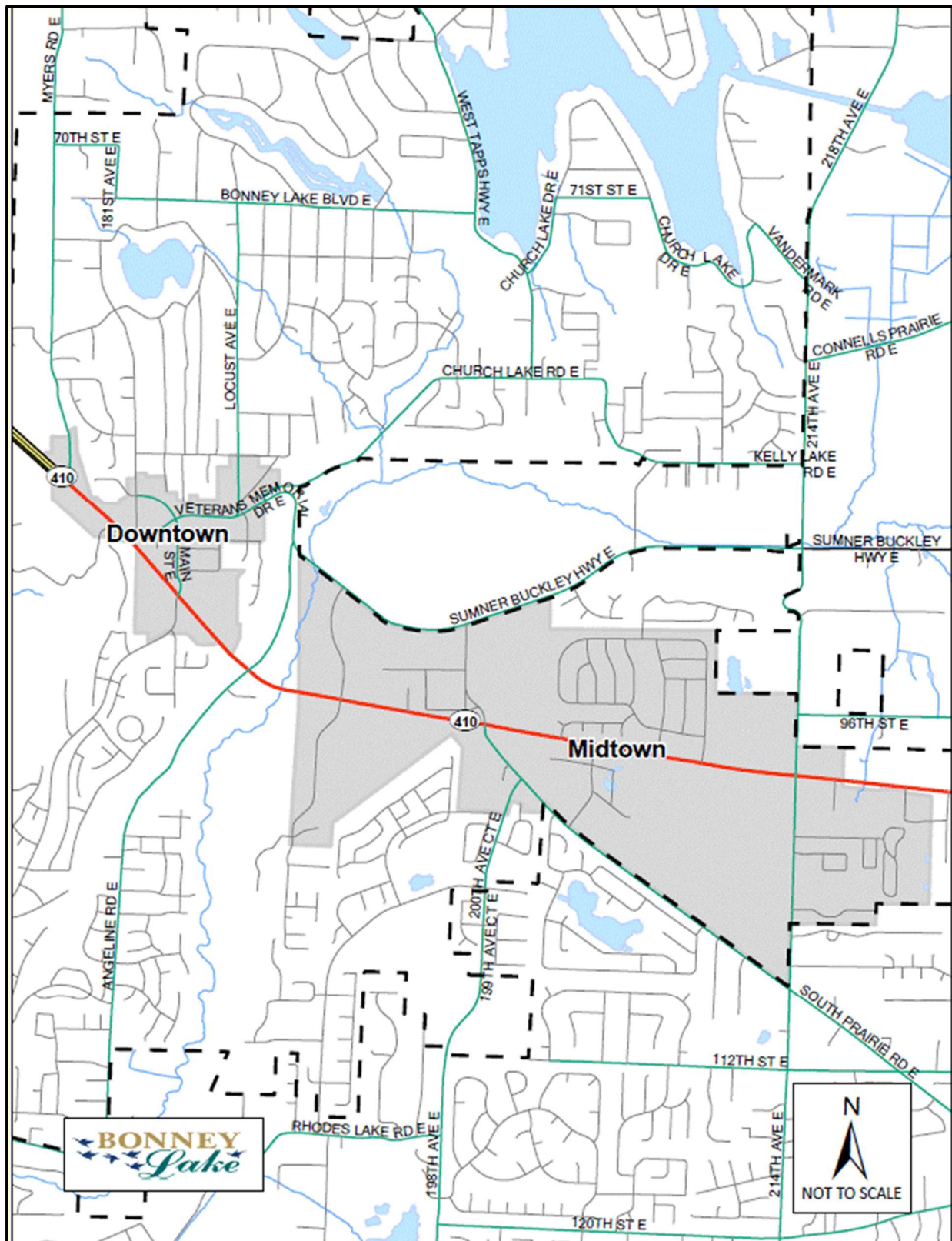
Centers are the most active places in the community, with a mix of housing, shopping, dining, services, recreation, civic and cultural events, and social activities. Centers are critical to the Central Puget Sound Region's ability to sustainably accommodate population and employment growth over the coming decades. Bonney Lake's Centers will provide high-density housing, regional shopping, and recreational areas that will draw individuals and families from across east Pierce County. Much of the Bonney Lake's growth potential lies within these centers. The *Bonney Lake Centers Plan*, incorporated by reference as **Appendix TBD** (see **Exhibit 48**):

- **Downtown:** Centrally located to Bonney Lake residents, this area is the traditional community center, and is a designated Countywide Center planned for lively shopping streets, office buildings, residences, and public facilities.
- **Midtown:** Bonney Lake's commercial center of gravity. It is automobile-oriented, but has potential for higher diversity of uses and human-scale development in the areas that remain undeveloped, especially in those portions that will be served by side streets and frontage streets. Pedestrian facilities need to be provided in balance with the auto-centric nature of the uses in the area.

⁷⁵ Robert E. Lang and Stven P. Hornburg (1998) What is social capital and why is it important to public policy?. *Housing Policy Debate*, 9(1), 1-16.

⁷⁶ Policy Link and the California Endowment (2007) *Why Place Matters: Building a Movement for Healthy Communities*.

Exhibit 48: Bonney Lake Centers

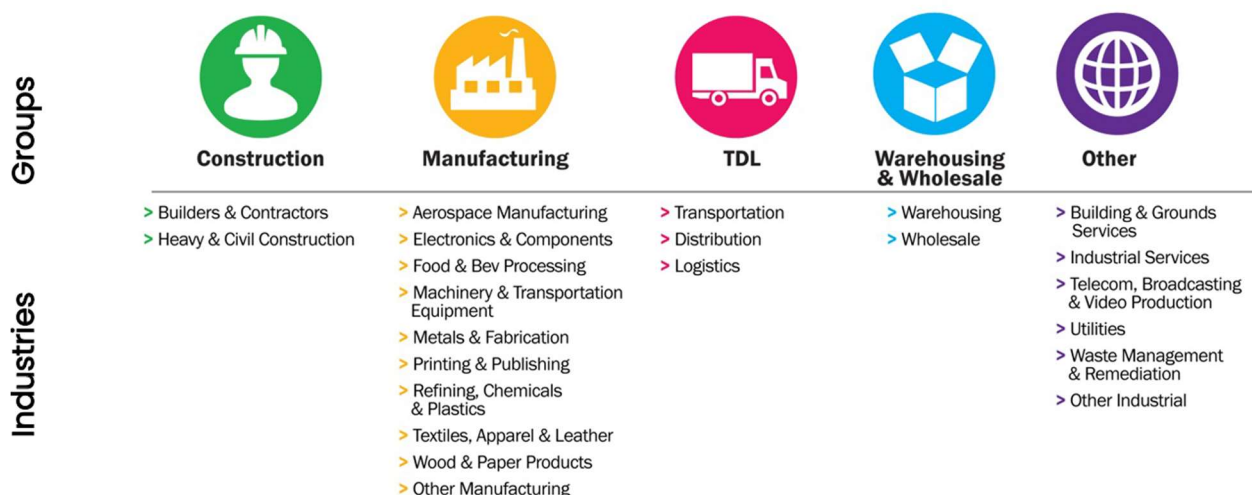


Light Industrial Areas

In 2024, PSRC updated its *Industrial Lands Analysis* to provide an assessment of industrial land in the Central Puget Sound region, including identification of the existing industrial lands and strategies to maintain, preserve, and increase the supply of these industrial lands in the region. The Industrial Lands Report identified ten (10) geographical concentrations or subareas of industrial lands, designated as Manufacturing/Industrial Centers (MICs) in VISION 2050.

In addition to these specifically identified subareas, other non-concentrated industrial lands were identified in the report. The Eastown subarea was identified as one of these areas and was categorized as part of the Industrial-Commercial supply. Industrial-Commercial zoning is a type of local zoning classification that permits a variety of industrial and commercial uses⁷⁸ (see **Exhibit 49**).

Exhibit 49: Typical Industrial Employment Groups



Source: Courtesy of Puget Sound Regional Council (2024) *Industrial Lands Analysis*. Figure 3.1, p. 18. Available online at: <https://www.psrc.org/media/8716>

The City's Eastown subarea provides an opportunity for the City to diversify its economic base and add family-wage jobs. While the area will not provide a regionally significant number of manufacturing jobs, development of light industrial uses in Eastown will allow more people to live and work within the City.

⁷⁸ Puget Sound Regional Council (2024) *Industrial Lands Analysis*. p. 11. Available online at: <https://www.psrc.org/media/8716>

Residential Areas

Vibrant residential areas that are inclusive and supportive of all people at all stages of life including families, young people, older adults, and persons with disabilities are fundamental to the health and vitality of Bonney Lake and its residents. Residential areas should include amenities for recreation, culture, and social interaction while providing opportunities to connect with the community and nature. These amenities and spaces include parks, natural lands, schools, libraries, place of worship and civic buildings. It is important that these resources are located within or near residential areas, close to residents and accessible by walking and bicycling.

Open Space

Green belts and parks are an important land element within the plan for Bonney Lake, since one of the primary purposes of a municipality is to offer maximum recreation facilities in a suburban setting. The green belts may be any open space such as watersheds, farms, forest and parks.

- *Plan for Bonney Lake, Washington (1964)*

Preservation of open space around Bonney Lake, complemented by local parks and natural areas, has been a critical component of the City's Comprehensive Plan since 1964. The City has consistently worked to protect the City's natural resources, provide opportunities for recreation, enhance visual beauty, and shape Bonney Lake's character. Open space is the third largest land use within the city limits, encompassing over 557 acres. It provides structure to the City, space for recreation, and a means of protecting important natural resources. Policies for parks, private open space, and other open spaces in Bonney Lake reflect the City's commitment to enhancing the City's character, meeting the recreational needs of its residents, improving the health of the community, and protecting the natural environment. The policies in the **Community Services and Facilities Element** and the **Parks, Trails, Recreation and Open Space Plan (Appendix TBD)** supplement the policies in this Element.

Public Spaces

The most familiar public spaces in Bonney Lake are parks, schools, and public buildings, but the term also applies more broadly to the entire public "realm" including streets, sidewalks, medians, planting strips, and all the public spaces one experiences when traveling through the City.

Corridors have traditionally been associated with transportation functions – carrying vehicles from freeways to homes and businesses in the City. Over the years, this function

has influenced land use, to the point that many corridors have become centers themselves. Some Bonney Lake corridors are lined with shopping, services, offices, and community institutions. The existing pattern largely favors automobiles over pedestrians and other modes, and is part of Bonney Lake's legacy as an auto-centric city. Looking to the future, some of the City's corridors will be reshaped to reflect contemporary planning and development practices. Activity will be focused around nodes rather than continuing the current linear commercial pattern, creating denser, pedestrian-oriented places at key locations.

The policies in this Element strive to create memorable public spaces throughout the City. For City parks and public buildings, this means creating focal points for neighborhoods and centers. Public open spaces such as parks and plazas can help strengthen civic identity and provide important community gathering places. Public buildings such as schools, fire stations, recreation centers and municipal offices should likewise highlight exemplary design.

The most basic infrastructure opportunities involve existing streets and highways. The City has already invested millions of dollars in streetscape improvements, including street lighting, undergrounding of utilities, landscaping, street trees, irrigation systems, signage, and street furniture, to improve the visual quality of its streets and make them safer and more attractive. The design of street space is particularly important to the goal of making the city more pedestrian- friendly.

Scenic Resources

In addition to the buildings, landscapes, and public spaces, the City's natural surroundings including beautiful lakes, wooded hillsides, the Fennel Creek corridor, and views of Mount Rainier, the Cascade Mountains, and the Olympic Mountains help shape Bonney Lake's character. As Bonney Lake continues to grow, a key challenge will be balancing new development with preservation of the natural resources that give the area much of its character.



Exhibit 50: View of Mount Rainier

Top community priorities include:

- Preserving the lakes and views of Mount Rainier, the Cascade Mountains, and the Olympic Mountains;
- Preserving large tracts of woodland and open space for public enjoyment;

- Adding landscaping at gateways and along key corridors; and
- Preserving vegetation in new developments to the greatest extent possible and, when not possible, re-vegetating developed areas.

While City programs and requirements such as open space preservation and environmental critical area regulations protect the natural settings, additional comprehensive strategies are needed to protect scenic resources and preserve the “scenic routes” illustrated on **Exhibit 53** throughout the City.

Gateways



Exhibit 51: Ascent Park

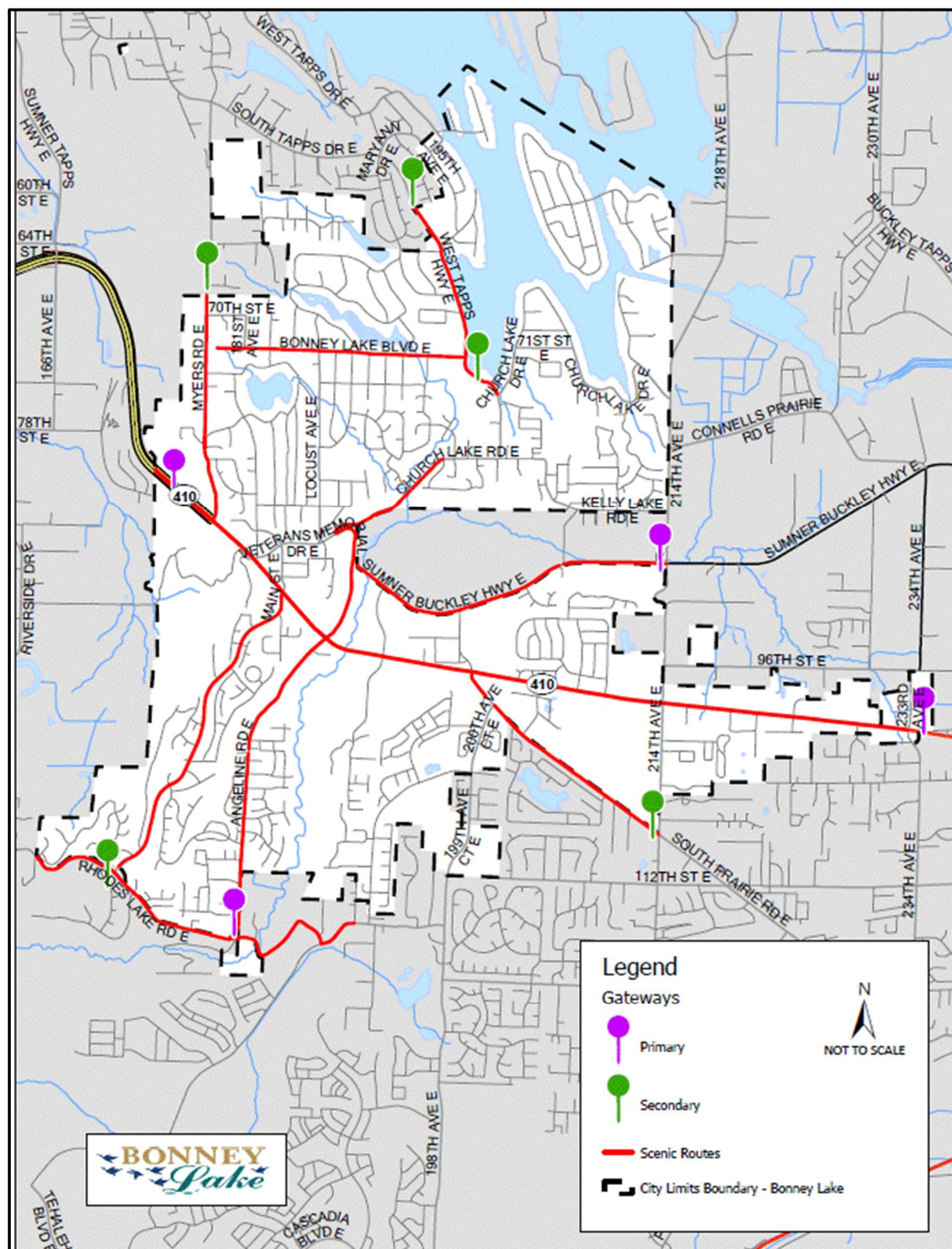
First impressions are important to a positive community character. “Gateways” are key locations throughout the community where these impressions can best be established and reinforced. Gateways provide a focal point and a visual “announcement” of the City of Bonney Lake by communicating the unique character and identity of Bonney Lake, and by visually distinguishing its neighbors.

There are three types of gateways (see **Exhibit 53** for locations):

- **Primary Gateways** are focal points, typically located around highway intersections/ interchanges and major entrances to Bonney Lake. These gateways are the highest priority for improvements. Private development around these areas should create a distinctive image and be held to the highest design and aesthetic standards. Aesthetic improvements in these areas should incorporate elements that enhance the community image with enhanced landscaping and aesthetic elements such as decorative street lighting, public art, unique signage and decorative paving.
- **Secondary Gateway** are focal points around other major street intersections and entrances into Bonney Lake. These areas should project a positive community image, and private development around these areas should be held to the highest design and aesthetic standards, which creates a distinctive image for Bonney Lake. Aesthetic improvements in these areas should reinforce the community’s unique character through compatible streetscape enhancements, monuments and public art.

- **Neighborhood/District Gateways** highlight particular neighborhoods and business districts that help announce a development and transition from the public setting to the more private setting of a neighborhood or business district. Unlike Primary and Secondary gateways, these improvements are largely the responsibility of private property owners. Amenities include well-designed entry monuments, private art, unique landscaping, and other elements that further establish Bonney Lake's character while announcing the neighborhood or development. Public infrastructure in these areas should meet enhanced standards for appearance and general maintenance.

Exhibit 53: Bonney Lake Scenic Routes and Gateways



Guiding Development

Growth must be carefully managed to maintain and enhance Bonney Lake's high quality of life. New development should make a positive contribution to the City by creating an attractive, livable, and walkable community, promoting public health, and protecting the elements of community life valued by Bonney Lake's residents.

Bonney Lake's development regulations are particularly important as those regulations implement the Comprehensive Plan at the parcel level and establish detailed standards and parameters for the use of property. The objective is to create great places of lasting value. State law requires the City's development regulations to be consistent with this Comprehensive Plan By:

- Addressing the subdivision of land;
- Providing for the improvement of infrastructure and public facilities to keep pace with growth;
- Promoting high quality development;
- Addressing the relationship of buildings with the surrounding neighborhood context;
- Ensuring that development is safe, aesthetically pleasing, and harmonious with its setting;
- Supporting the goals of the community; and

Managing the ways Bonney Lake will carry out its commitment to be a sustainable suburban community.

6.4 POTENTIAL ANNEXATION AREAS

Annexation is the process under Washington State law that cities and towns use to expand their boundaries. With limited exceptions, urban development, densities, and services can only occur within an incorporated city or town. Once an area is annexed, the property owners are able to benefit from the municipal services, regulations, voting privileges and taxing authority of the city or town. In Washington, annexations are generally limited to areas that are contiguous to an existing city boundary and are located within a city or town's designated Urban Growth Area (UGA).

Pierce County is responsible for designating the UGA, which must be of sufficient size to accommodate the County's allocated population growth for the upcoming 20-year planning period. The GMA requires the county to coordinate with local cities and towns to identify portions of the UGA for future annexation by a specific city or town. In Pierce County, these areas are called Potential Annexation Areas (PAAs), and cannot be annexed by another city. The remaining areas that have not yet been identified for

annexation by a particular city or town are called the Comprehensive Urban Growth Area (CUGA).

Pierce County has officially identified two PAAs in coordination with for Bonney Lake:

1. **Victor Falls/Country Highlands PAA:** The Victor Falls/County Highlands PAA includes the Victor Falls Terrace subdivision and the area bounded by the City on the west and the north, 198th Avenue East on the west, and Rhodes Lake Rd E on the south. The PAA contains approximately 112.84 acres. The PAA and the City of Bonney Lake share a common boundary of 60%; therefore, the City could pursue annexation of the area pursuant to RCW 35A.14.460.
2. **Ponderosa Estates/Wilderness Ridge PAA:** The area is bounded by the City limits on the west and the north, 214th Avenue East on the east, and 112th St E on the south. The PAA contains approximately 289.45 acres. The PAA and the City of Bonney Lake share a common boundary of 69%; therefore, the City could pursue annexation of the area pursuant to RCW 35A.14.460.

In addition to these two PAAs, the City is also evaluating the possibility of adding three other areas to the Bonney Lake UGA (BLUGA) as PAAs. Some of the areas are currently within the CUGA and others are outside of the CUGA, but all were identified for inclusion in the BLUGA in the Comprehensive Plan Update and Draft Environmental Impact Statement Bonney Lake Washington (July 1, 1994). The intent of adding the following areas to the CUGA is not to perpetuate the conversion of rural lands into urban lands, but to ensure that areas already "characterized by urban growth" are included in the CUGA or in the UGA as a PAA for the City, as envisioned by RCW 36.70A.110(1):

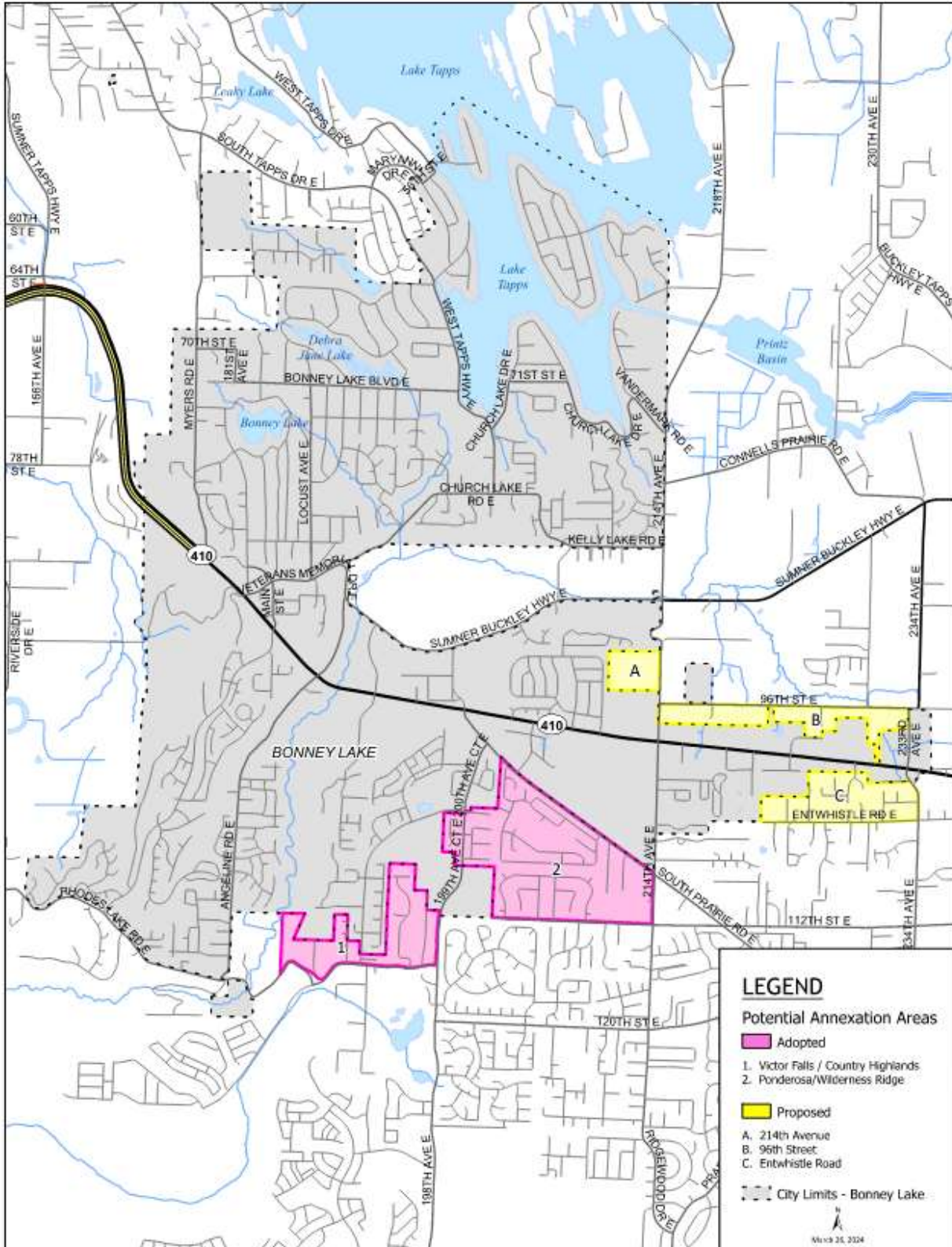
- A. **214th Avenue East:** This area is bounded by the existing city limits on the north, west, and south, and by 214th Avenue East on the east, containing approximately 29 acres. Nearly half of this PAA is covered with wetlands. The primary intent of this expansion would be to establish a regular boundary between the City and rural Pierce County. This area would only be added to the Urban Growth Area following a reduction somewhere else in the Pierce County Urban Growth area so that there is no net gain in the overall capacity of the CUGA.
- B. **96th Avenue East:** This area is bounded by 214th Avenue East on the west, 96th Street East on the north, 233rd Avenue East on the east, and the existing City boundaries on the south. It contains approximately 71 acres. The intent of this expansion would be to establish a regular boundary between the City and rural Pierce County. This area would only be added to the Urban Growth Area following a reduction somewhere else in the Pierce County Urban Growth area so that there is no net gain in the overall capacity of the County's Urban Growth Area.

- C. Entwhistle:** This area is bounded by 214th Avenue East on the west, the City boundaries on the north, 234th Avenue East on the east, and Entwhistle Road on the south. It contains approximately 97 acres. The primary intent is to establish a regular boundary between the City and rural Pierce County. This area would only be added to the Urban Growth Area following a reduction somewhere else in the Pierce County Urban Growth area so that there is no net gain in the overall capacity of the County's Urban Growth Area.

The City expects to enter into Joint Planning Agreements prior to the official expansion of the BLUGA / PAAs by Pierce County. During the process of working with Pierce County to add these areas to the CUGA, the City would work with Pierce County to identify other areas within the CUGA that still retain a rural character and which could be removed from the CUGA to ensure that there is not an overall increase in the capacity of the CUGA.

See **Exhibit 54** for the locations of PAAs and potential PAAs.

Exhibit 54: Bonney Lake Potential Annexation Areas (PAAs) and Proposed PAAs



6.5 FUTURE LAND USE MAP OVERVIEW

The Future Land Use Map (FLUM) uses color-coded designations to express the intended use of land across the Bonney Lake area within the planning horizon of this Comprehensive Plan. Preparation of the FLUM is explicitly required by the GMA.

In most cases, the designation on the FLUM matches the existing use of land. In other cases, the designation may be different from the current use or development located on a property, indicating that the City expects the current use to change and redevelopment to occur as Bonney Lake adds population and jobs. For example, a parcel that is in “commercial” use today but designated as “mixed use” on the map would be expected to redevelop with a mix of commercial and residential uses.

The FLUM is implemented through the City’s zoning regulations. Each color-coded category on the FLUM has one or more corresponding zoning districts. While the FLUM guides zoning, it is not the same as the Zoning Map. By definition, the FLUM is intended to be general and does not necessarily follow parcel boundaries. Streets and public rights-of-way have the same designation as the adjacent property; however, the rights of way remain uncolored on the FLUM until the street or right-of-way is vacated (see **Exhibit 55**).

6.6 FUTURE LAND USE DESIGNATIONS

Residential – Low Density

Intended For: Detached residential development, but also may include accessory dwelling units, attached or detached single-unit housing, townhomes, or cottages. This category is appropriate for planned public and semi-public uses designed to be compatible with residential uses, such as schools, religious institutions, and civic uses.

Zoning District(s): R-1

Residential – High Density

Intended For: A variety of high-density residential land uses, including townhomes, multiplexes, and garden apartment/condo dwellings. Additional uses including institutional and civic uses, live/work, offices, and neighborhood-scale retail stores (not including automotive-oriented uses and freestanding pad sites) as part of mixed-use developments. Such nonresidential uses are intended to provide services only to residents of the surrounding area and to be placed in locations with a design character that blends into the neighborhood.

Zoning District(s): High-Density Residential (R-3)

Public Facility

Intended For: Non-open space parcels owned by public agencies or utilities. The designation includes City facilities, public schools, water and sanitary

district facilities, transit agency facilities, utilities, and other federal, state, county, and local government facilities.

Zoning District(s): Public Facilities (PF)

Commercial – General

Intended For: Areas for commercial and service uses, which are compatible with neighborhoods. Typical uses include local services, retail, eating and drinking establishments, and civic facilities.

Zoning District(s): Commercial (C-2) or Midtown Core (MC)

Commercial – Mixed Use

Intended For: A mix of high-density residential, institutional, and civic uses, offices, cultural activities, and retail sales and services, with protections against retail sales and services becoming dominant. Mixing of uses on the same site is encouraged.

Zoning District(s): Downtown Mixed Use (DM), Downtown Core (DC), or Neighborhood Commercial (C-1)

Commercial – Industrial

Intended For: Appropriately located areas for various land intensive and/or limited service commercial establishments, office uses, major retail stores and service establishments offering commodities and services required by residents and the surrounding market area, wholesale distribution facilities, research and light industrial enterprises which do not generate excessive noise, odors, dust, smoke, heavy traffic congestion or pollution of water or air.

Zoning District(s): Easttown (E)

Open Space – Public

Intended For: Public parks that are owned and operated by the City of Bonney Lake, including active and passive recreation areas and environmentally critical areas. Typical uses include athletic fields, playgrounds, and trails. The appropriate uses in any given park are based on the park's classification and standards, (described in the Parks, Recreation, Trails & Open Space Plan, see **Appendix TBD**).

This category also includes lands owned by public or quasi-public agencies other than the City of Bonney Lake, including the Buckley-Bonney Lake Regional Park, the Tacoma Public Utilities transmission line rights-of-way, and property owned by the Cascade Water Alliance above the ordinary high-water mark (OHWM).

Zoning District(s): Residential/Conservation (RC-5) or Public Facility (PF)

Open Space – Private

Intended For: Private land set aside as open space within planned communities. Private open space uses may include natural areas, passive use areas, and outdoor recreation facilities, clubhouses, community

amenities, such as playgrounds and picnic areas, and areas classified as environmentally critical areas located on private property. Except for ancillary structures related to the intended open space use, other types of development are not permitted in areas with this designation.

Zoning District(s): R-1, High-Density Residential (R-3) or Residential/Conservation (RC-5)



Open Space – Conservancy

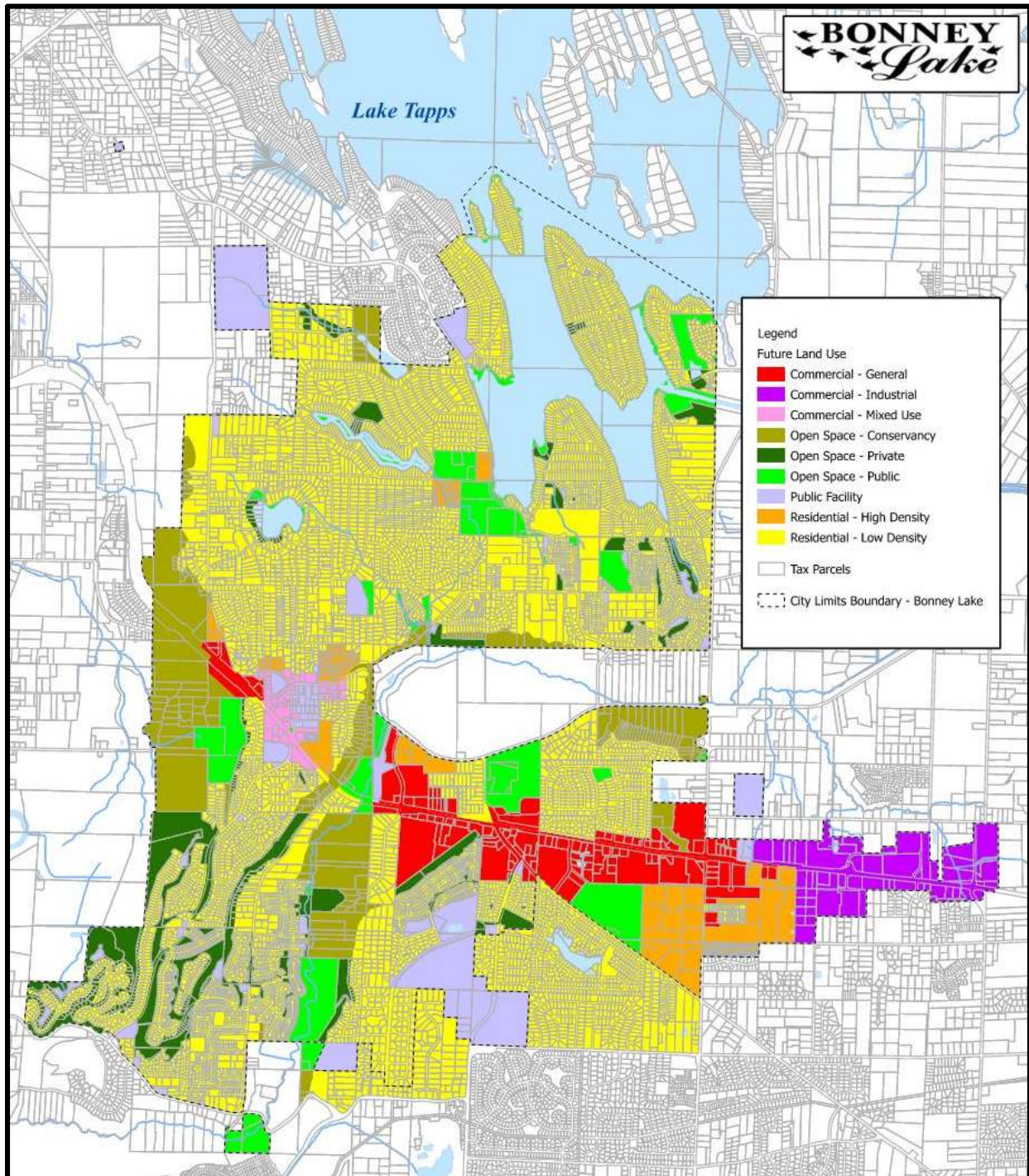
Intended For: Private land with an open space character that is vacant or previously developed. Properties within this designation may be subject to constraints of soil instability, property access, water and flood levels, landslides, or slopes greater than 30% that restrict the use of the property with structures. Allowable uses for this designation include public facilities, recreation facilities, quasi-public facilities, one single-family home on a legally established lot, grazing, and small-scale cultivation.

New residential development is allowed at a maximum density of one unit per five acres. Undeveloped portions of property within the Conservancy designation should be set aside for conservation purposes.

Zoning District(s): Residential/Conservation (RC-5)

6.7 FUTURE LAND USE MAP

Exhibit 55: Bonney Lake Future Land Use Map (FLUM)



6.8 FUTURE LAND USE GOALS AND POLICIES

The policies in this section identify actions the City should consider over the upcoming planning period to achieve the stated goals.

Goal CD-LU-1: Develop dynamic and vibrant centers accommodating housing, shopping, services, civic activities, entertainment facilities, and recreational opportunities in a manner that harmoniously blends the natural and built environments.

- Policies:**
- CD-LU-1.1** Local centers take a variety of forms. Some may be characterized by predominantly retail uses, while others may contain a more varied mix of activities including commercial, office, residential, parks, community centers, other civic facilities, and education facilities. Bonney Lake will maintain a variety of centers within the City that meet a range of neighborhood, citywide, and regional needs based on the following hierarchy:
 - Downtown, which will accommodate pedestrian-oriented retail uses, uses that serve residents and employees, and specialty and “niche” activities such as entertainment, outdoor dining, and civic uses.
 - Midtown, which will accommodate a variety of uses including high density residential, offices, restaurants, large regional grocery stores, specialty retail stores, and regional shopping centers.
 - CD-LU-1.2** Encourage the development of mixed-use, senior housing, high-density residential, and public services uses such as education, health care, libraries, child care, governmental facilities in the centers to create vibrant activity nodes, provide a variety of housing choices, advance sustainable development principles, and support transit.
 - CD-LU-1.3** In selecting which transportation or infrastructure projects to be funded by the City, the City should give priority to the City's Centers.
 - CD-LU-1.4** Support the transformation of auto-oriented shopping centers—currently characterized by retail strips surrounded by large surface parking lots—into more pedestrian-oriented centers to generate foot traffic, create a stronger sense of place, and bring life to outdoor spaces.
 - CD-LU-1.5** Encourage the use of shared parking in commercial districts, rather than independent parking lots on each commercial

property in order to reduce the total land area dedicated to parking and create a more pedestrian-friendly environment.

CD-LU-1.6 Develop the Downtown as Bonney Lake's center with the highest level of land use diversity, architectural interest, pedestrian orientation, and human-scale design. New buildings should have their facades at the sidewalk edge except in certain cases along SR-410, as shown in the Centers Plan.

CD-LU-1.7 Develop the Midtown Center as a mixed-use district with the highest possible level of architectural interest, pedestrian orientation, and human-scale design consistent with the facts that 1) much of it is already built and 2) pedestrian traffic alongside and across the highway will suffer due to high vehicular traffic. Wherever possible, developments should reach deeply into the adjoining commercial land, provide local access streets as dictated by the Mobility Element, and place their building facades at the edge of the sidewalk adjoining said local access streets.

Goal CD-LU-2: Develop Eastown as a light-industrial area to increase the number and diversity of jobs available to the citizens of Bonney Lake and to diversify the City's tax base.

- Policies:**
- CD-LU-2.1** Develop Eastown with 1) architectural detail suitable for automobile orientation along SR-410, 2) internal and, if possible external pedestrian connections, and 3) preference for business park or campus-scale development.
 - CD-LU-2.2** Encourage parcel consolidation to provide infill sites for redevelopment and expansion opportunities.
 - CD-LU-2.3** Encourage best management practices for site planning and design related to, but not limited to, building placement and orientation, vehicular and pedestrian circulation patterns, open space, landscaping, lighting, stormwater management, interfacings with adjacent neighborhoods and developments, and appropriate accommodation of the site's natural features.
 - CD-LU-2.4** Improve services to the area to support redevelopment opportunities primarily the development of sanitary sewer.

Goal CD-LU-3: Provide healthy, livable, well maintained, walkable, and safe residential neighborhoods that provide opportunities for social interaction in a manner that harmoniously blends the natural and built environments.

- Policies:**
- CD-LU-3.1** Planning and land use decisions should recognize residents as the foundation of the community, by promoting compatibility between existing and new housing units, protecting residential uses from adverse impacts and uses, and maintaining a range of residential zones to support the identified housing needs.
 - CD-LU-3.2** Allow home occupations in Bonney Lake's residences when all applicable regulations can be satisfied.
 - CD-LU-3.3** Support healthy and safe neighborhoods by developing and implementing programs to address nuisances and environmental hazards (e.g. excessive noise, poor air quality, light pollution, illegal dumping, illegal signage, graffiti, littering, etc.).
 - CD-LU-3.4** Conserve and protect the unique ecological characteristics of the City and utilize urban forestry to integrate open space, parks, green belts, street trees, landscaping, and natural features into future development in order to maintain Bonney Lake's livability, improve access to nature, and to address climate change by utilizing trees to sequester carbon from the atmosphere.
 - CD-LU-3.5** Utilize capital improvement projects, design guidelines, and land use decisions to improve the walkability of neighborhoods, enhance the ability to travel by bicycle or public transportation, and minimize the distance a resident must travel to reach basic services, shopping, parks, schools, and other civic amenities.
 - CD-LU-3.6** Create standards for clustering developments that conserves natural features and which minimizes the impact of development in environmentally sensitive areas.
 - CD-LU-3.7** Encourage subdivision designs in which residential lots are oriented towards, and take access from, the neighborhood of which they are a part.
 - CD-LU-3.8** Residential developments should be sited so individual residential dwelling does not take direct driveway access from an arterial.

Goal CD-LU-4: Provide streets, sidewalks, parks, plazas, civic buildings, and other public spaces that contribute to Bonney Lake's sense of place and visual quality.

- Policies:**
- CD-LU-4.1** Recognize the importance of streets as public space: Landscaping, lighting, streetscape elements, pavement changes, signage improvements, banners, and other public realm improvements can enhance the experience of traveling along a corridor without diminishing its functional capacity.

- CD-LU-4.2** Improvements to corridors should be appropriate to the scale and character of each street, reflecting their traffic volumes and intended functions.
- CD-LU-4.3** Design guidelines, design review requirements, engineering standards, and capital improvement projects should aim to improve the visual quality of street space.
- CD-LU-4.4** Use street furniture (e.g. benches, trash cans, kiosks, bicycle lockers, bus shelters, etc.) to improve the pedestrian experience, create stronger identity and visual cohesion, and contribute to the desired character of an area.
- CD-LU-4.5** Encourage the development of public gathering spaces within new developments that are responsive to a project's scale and expected level of activity, and respectful of surrounding land uses.
- CD-LU-4.6** Encourage plazas, pocket parks, and similar spaces to stimulate pedestrian activity, provide community-gathering places, and complement the overall appearance and form of adjoining buildings.
- CD-LU-4.7** While the design of each public space must be sensitive to its context, all public spaces should share several common design characteristics. These include:
- Locations in prominent, recognizable and accessible locations where they are likely to receive frequent use and be highly visible.
 - Seating areas, signage, pedestrian amenities, activity areas and other design features that increase usability and functionality.
 - A unique identity that enables the space to function independently, while still allowing the space to work in connection with adjacent development.
 - Accommodation of a variety of users (i.e. arts, cultural, recreational, different ages, abilities, etc.).
 - Variations in landscaping, pavement, lighting, public art, and other amenities which improve the quality of each space and define its character.
 - Protection from wind, sun, and noise exposure.
 - Spaces that utilize a mixture of direct sunlight and shade.
- CD-LU-4.8** Develop key "multi-modal" corridors that accommodate multiple modes of transportation that connect Bonney Lake's neighborhoods and centers, enhance the City's civic identity,

encourage transit use, reduce vehicle miles traveled, provide comfortable walking and bicycling environments, and project a positive image of the city.

Goal CD-LU-5: Improve gateways into Bonney Lake and into its individual neighborhoods and districts to achieve a sense of transition and arrival.

- Policies:**
- CD-LU-5.1** Develop gateway standards which provide guidance for the design and appearance of primary and secondary gateways into Bonney Lake.
 - CD-LU-5.2** Private development located within gateway areas should incorporate public improvements that enhance the identity and image of the City.
 - CD-LU-5.3** Require new development projects to provide gateway features, if their location and context warrant such inclusion.

Goal CD-LU-6: Guide growth and development to ensure that it is orderly and efficient; leverage public investment to address the needs of the underserved areas; ensure the continued availability of infrastructure and public services; reduce adverse impacts on adjacent properties; and to protect the natural environment.

- Policies:**
- CD-LU-6.1** Ensure that land use decisions consider the characteristics of the transportation network, including road capacity, the quality of the streetscape, and the availability of public transportation and other modes of travel.
 - CD-LU-6.2** Adopt and routinely update development regulations to direct growth, ensure sufficient opportunities for new development, maintain and improve Bonney Lake's quality of life, preserve and rehabilitate existing housing stock, mitigate nuisances, achieve compatibility between adjacent properties and uses, and protect the health, safety and welfare of residents, workers, and visitors.
 - CD-LU-6.3** Utilize urban design guidelines to guide and evaluate remodeling projects, additions, and new construction. Guidelines should:
 - Address building height, scale, massing, materials, colors, and detailing;
 - Ensure pedestrian connections;
 - Encourage interesting features such as varied roof forms, canopies, balconies, window displays, bay windows, vertically and horizontally modulated wall surfaces,

trellises with native vines, porches, artwork, planting beds, ornamental trim, modulations and varied textures, colors, and materials; and

- Ensure that sites are designed in context and relationship to surrounding uses and landscapes.

CD-LU-6.4 Recognize certain areas as having natural constraints that preclude safe or environmentally sound development. These constraints are discussed further in the **Environmental Stewardship Element**.

CD-LU-6.5 Allow new development to occur only when the public facilities needed to serve that development are available, or when provided for by the development through the payment of impact fees, in-lieu fees, or connection charge; construction of the facility as part of the development; or other mitigation measures.

CD-LU-6.6 Although the Comprehensive Plan provides for development capacity to accommodate growth through the planning period, steps should be taken to retain some of this capacity for after the planning period and guide development towards the Downtown and Midtown Centers.

CD-LU-6.7 ➤ Avoid the creation of “problem” parcels that are not practical to develop, access, or to provide with services. Work to eliminate or merge such parcels where they already exist.

CD-LU-6.8 Encourage partnerships between the City and the private sector to undertake joint public-private development.

CD-LU-6.9 Integrate new large-scale development projects into the fabric of the existing community rather than allowing such projects to be self-contained, walled off or physically divided from surrounding uses. New development should be viewed as an opportunity to improve connectivity between neighborhoods. To the extent feasible, circulation systems and open spaces in such developments should tie into existing streets and open spaces on the perimeter. In addition, existing development should be retrofitted over time to reduce unnecessary walls and barriers and improve pedestrian connections between neighborhoods.

CD-LU-6.10 Establish development regulations that facilitate the development of a positive regional identity for Bonney Lake as a City with outstanding neighborhoods and vibrant centers that provide gathering places for residents and visitors.

- CD-LU-6.11** Redevelop Bonney Lake's under-developed or vacant sites in a manner that balances providing an array of housing, jobs, retail, recreational, and entertainment opportunities, with the need to respect the planned scale and form of surrounding properties and neighborhoods.
- CD-LU-6.12** Allow for the siting of Essential Public Facilities as required by State law.

Goal CD-LU-7: Preserve open space, parks, greenbelts, and natural areas, which together protect the Bonney Lake's natural resources, provide opportunities for recreation, enhance visual beauty, and shape Bonney Lake's character.

- Policies:**
- CD-LU-7.1** Maintain development regulations which distinguish between different types of open space, based on the different types of activities that take place on undeveloped land.
- CD-LU-7.2** Maintain and enhance a network of neighborhood, community, and linear parks. Parks should be recognized as fundamental to Bonney Lake's quality of life, and should be carefully managed to create a balance between passive and active open space.
- CD-LU-7.3** Utilize open space, including parks, greenbelts, easements, and other open areas to connect the City, provide car-free corridors for pedestrians and bicyclists, and tie together Bonney Lake's neighborhoods, centers, and employment districts.
- CD-LU-7.4** Encourage private-public partnerships to create on-site open space for public enjoyment in mixed-use areas and commercial areas.
- CD-LU-7.5** Allow community gardening and "urban" agriculture in residentially-zoned areas and open spaces, provided that these uses do not impact the functions and values of environmentally critical areas.
- CD-LU-7.6** Allow recreational uses on lands designated as environmentally critical areas, provided that these uses do not impact the function and values of environmentally critical areas.
- CD-LU-7.7** Establish zoning standards to mitigate for the presence of infrastructure facilities such as radio and telecommunication towers within designated open space areas.
- CD-LU-7.8** Prevent the encroachment or conversion of common open space areas within planned developments or other residential

projects. Shared open space areas in residential subdivisions shall be permanently restricted to open space uses through deed restrictions or other appropriate means.

CD-LU-7.9 Advocate for open space conservation and resource protection in the unincorporated areas east of the Bonney Lake's city limits but within the City's sphere of influence. These areas should remain in agricultural and open space uses for the lifetime of this Comprehensive Plan.

CD-LU-7.10 Preserve historic and cultural resources as assets for the future, in consultation with local, Federally-recognized tribes.

Goal CD-LU-8: Protect and enhance Bonney Lake's scenic, natural, and visual character.

- Policies:**
- CD-LU-8.1** Preserve views through sensitive site design, especially along scenic corridors. Prevent new development from blocking important public views.
 - CD-LU-8.2** Maintain a network of designated scenic routes through Bonney Lake. A particular road or corridor may be considered scenic by virtue of its design or amenities, the terrain and natural features it traverses, or the views and visual importance it commands. The designation expresses an intent to maintain or improve visual features, which protects public views through land use, transportation, and capital improvement decisions, as well as landscaping, operations, and maintenance activities along these corridors, but does not necessarily limit abutting uses.
 - CD-LU-8.3** Acquire lands or view easements if necessary to preserve important public views.
 - CD-LU-8.4** Encourage developers to retain mature trees to the extent possible, particularly in residential areas.
 - CD-LU-8.5** Reduce the visual impacts of utility lines and poles along corridors by continuing to underground overhead lines within existing development, and by requiring underground utilities in new developments.
 - CD-LU-8.6** On the south side of SR-410 near the western city limits, tree cutting shall not extend so far from SR-410 as to remove the solid backdrop of mature trees as viewed horizontally from SR-410.

Goal CD-LU-9: Improve access and opportunities to enhance the health of all Bonney Lake residents while reducing the negative factors that reduce their well-being.

- Policies:**
- CD-LU-9.1** Reduce the negative health effects of air, noise and light pollution through regulation and environmental strategies.
 - CD-LU-9.2** Improve walkability and promote active, nonmotorized forms of transportation to improve public health and minimize environmental impacts.
 - CD-LU-9.3** Increase access to healthy food for all Bonney Lake residents by encouraging and supporting healthy food retail and partnerships with the local food bank.

Goal CD-LU-10: Ensure that development in the City's potential annexation area is accompanied by adequate urban services and facilities; reduces sprawl; implements the Growth Management Act, Vision 2050's Multi-Countywide Planning Policies for Pierce County and the Bonney Lake Comprehensive Plan.

- Policies:**
- CD-LU-10.1** Review proposed annexations for their timeliness, the City's ability to provide them with urban services, and the costs and revenues that the City would likely incur. The City may refuse annexations in which public facilities are below the City's level of service standard.
 - CD-LU-10.2** The City shall actively pursue joint planning agreements with Pierce County to ensure that all development within Bonney Lake's PAA is built to mutually agreed upon standards. These agreements should cover a wide range of areas, including, but not limited to, development standards, collection of impact fees, annexations, urban service provision and land use, transportation, parks, and capital facilities planning.
 - CD-LU-10.3** Consult affected residents, cities, special purpose districts, tribes, and other parties prior to final approval of any annexation.
 - CD-LU-10.4** Ensure that additional capacity associated with expansion of the BLUGA maintains the current capacity of the Pierce County urban growth area through targeted reductions to the CUGA.

HOUSING EQUITY REPORT

An Analysis of Disparate Impacts, Exclusion, and Displacement in Bonney Lake

July 2024

THIS MAP WAS PREPARED UNDER THE GENERAL SUPERVISION OF THE WASHINGTON STATE DEPARTMENT OF COMMERCE AND ECONOMIC DEVELOPMENT AND WAS FINANCIALLY ASSISTED THROUGH AN URBAN PLANNING GRANT FROM THE HOUSING AND HOME FINANCE AGENCY UNDER THE PROVISIONS OF SECTION 701 OF THE HOUSING ACT OF 1954, AS AMENDED.

- RESIDENTIAL
- COMMERCIAL
- INDUSTRIAL
- GREEN BELT
- PRIVATE GREEN AREAS
- PUBLIC PARKS

CIRCULAR DESIGN INDICATES SCHEMATIC LOCATION

0 2000 4000 FT.



LAND USE PLAN

BONNEY LAKE, WASH.



Envision BONNEY LAKE

Celebrating 100 Years

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1. EXECUTIVE SUMMARY

A recent update to Washington's Growth Management Act (GMA, Revised Code of Washington (RCW) 36.70A.070) requires local jurisdictions to identify policies and regulations that could or may have resulted in racially disparate impacts, displacement, and exclusion in housing and to implement policies to address and undo these effects. Additionally, jurisdictions must identify areas that may be at a higher risk of displacement from market forces that occur because of changes to zoning, development regulations, and capital investments and establish anti-displacement policies.

The City of Bonney Lake is completing this Housing Equity Report as part of its periodic update to its Comprehensive Plan, due at the end of 2024. A Comprehensive Plan is a long-term vision and policy document that helps the City prepare for and manage project population and employment growth, as well as coordinate land use, transportation, parks, sewer and water systems, natural resources, and major public investments. It describes the City's future in broad terms and guides specific implementation, such as zoning, development standards, and infrastructure design.

This report analyzes data, evaluates policies, and recommended new or amended policies and regulations to achieve more equitable housing outcomes.

1.1 KEY FINDINGS

This Housing Equity Report broadly evaluates three major themes of racial inequity in housing – racially disparate impacts, exclusion, and displacement risk. Key findings include:

Intentional Discrimination in Housing

- Between the 1920s and the 1950s, the use of racially restrictive covenants was widespread and effectively segregated neighborhoods. No evidence of these covenants has been found in Bonney Lake as of this report.
- Between the 1930s and the 1960s, the practice of redlining denied people access to housing loans due to where they lived, even if they were personally qualified. No evidence of redlining has been found in Bonney Lake as of this report.

Racially Disparate Impacts in Housing

- Bonney Lake has significantly higher rates of homeownership than Pierce County amongst all but one racial and ethnic groups.
- American Indian, Other, and Hispanic owner-occupied housing units face a higher rate of housing cost burden. In renter-occupied units, White and Other

households have a higher rate of cost burden. Defined as total housing costs being greater than 30% of a household's income, cost burden can result in households being excluded from an area due to housing costs.

- As of 2021, Bonney Lake does not have a shortage of homes affordable to low income (households earning 30-50% of Area Median Income, or AMI) and very low income households (households earning less than 50% of AMI). The number of housing units affordable in each income category has increased since 2011. In communities where there are fewer affordable homes for households in an income band, higher income households may “down rent” into more affordable housing units, which prevents those units from being available for households in the lower income bands.
- American Indian households face a significant gap (\$240,500) between the home price the household can afford and the cost of a median-priced home in Bonney Lake. Multi-racial households face a smaller gap of \$77,000.
- The Hispanic median household income is higher than the citywide median; however, the homeownership rate lags 18% behind the citywide rate.

Displacement Risk

- The low rates of renter households and higher incomes relative to Pierce County indicates that there are no areas of higher displacement risk in Bonney Lake. Based on income and cost burden, however, American Indian and Alaska Native residents are at the highest risk of displacement.
- Foreclosures and evictions in Bonney Lake are lower than the national and county average. Overall housing quality is high, though there are a small number of units which have inadequate plumbing and heating sources.
- Existing lower densities, underutilized and vacant land suggest that Bonney Lake can continue to absorb new development without redevelopment of older housing that could cause displacement.

➤ *Exhibit 1: Summary of Observed Disparities*

	White	Black	American Indian or Alaska Native	Asian	Native Hawaiian or Pacific Islander	Multi-Racial	Other	Hispanic, Any Race
Racially Disparate Impacts	○	○	○	○	Limited Data	○	●	◐ (gap is closing)
Exclusionary Housing	○	○	○	●	○	◐	◐	●
Displacement Risk	○							

Yes = ●

Partial = ◐

No = ○

1.2 COMPONENTS OF THE REPORT

This report includes the following sections:

- **Regulatory Requirements** describes the statutory framework for the analysis and provides definitions of key concepts terms in the legislation and this document.
- The **Impact Assessment** uses publicly available data to look at current housing patterns and assess whether there are racially disparate impacts, displacement, and/or exclusion in Bonney Lake's housing patterns. This assessment is based on the Washington State Department of Commerce's *Guidance to Address Racially Disparate Impacts* ("Commerce Guidance", April 2023)¹.
- The **Existing Policy Evaluation** evaluates the City's existing policies to determine whether they support GMA housing goals and whether they may contribute to racially disparate impacts, displacement, and exclusion in housing.
- **Recommended Strategies** describes policies and development regulations that should be considered in the City's Comprehensive Plan to address racially disparate impacts, displacement, and exclusion in housing.

¹ Available online at: <https://www.commerce.wa.gov/serving-communities/growth-management/growth-management-topics/planning-for-housing/updating-gma-housing-elements/>

2. REGULATORY REQUIREMENTS

2.1 BRIEF HISTORY OF PLANNING IN BONNEY LAKE

In the 1920s, racially restrictive covenants became a widespread tool of discrimination before being ruled unenforceable by the U.S. Supreme Court in 1948². Restrictive covenants were used by developers to increase the desirability of new neighborhoods to prospective white purchasers. This resulted in segregated residential neighborhoods and restricted people of color from homeownership. Staff reviewed major subdivisions and did not find evidence of racially restrictive covenants being used in Bonney Lake.

In 1933, Congress passed the Home Owners' Loan Act and created the Home Owners Loan Corporation (HOLC), which generated residential maps that rated investment risk in larger metropolitan areas across the country. The HOLC maps led to the term "redlining", since neighborhoods with the highest risk rating were outlined in red. The practice resulted in existing and potential homeowners being denied access to loans because of the location of the home, even though they may have otherwise qualified. In 1968, the Fair Housing Act outlawed racially motivated redlining and tasked federal agencies with enforcement. As of this report, there is no evidence that redlining occurred in Bonney Lake.

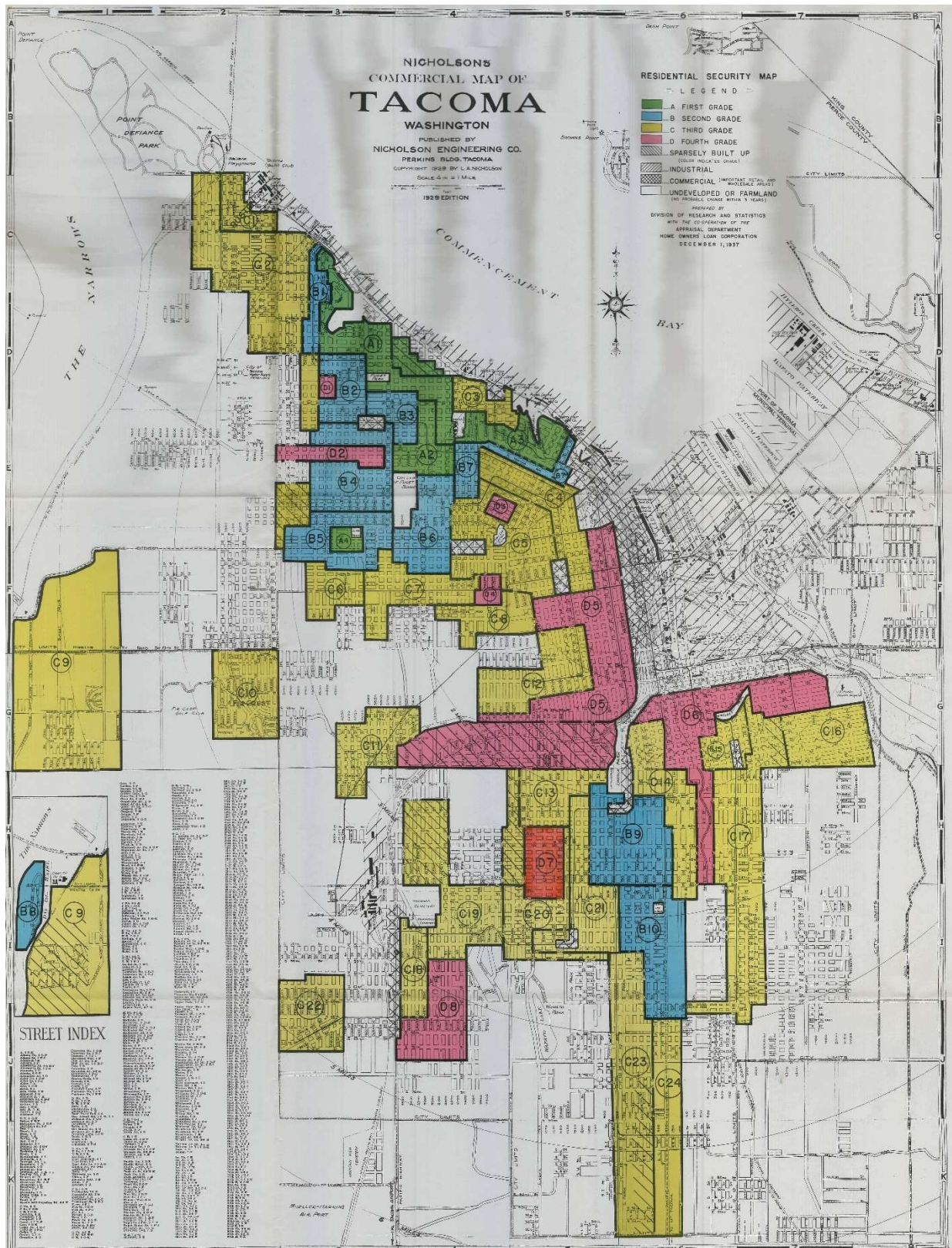
After incorporating in 1949, the Town of Bonney Lake adopted its first General Comprehensive Plan in 1964 ("1964 Plan", Ordinance No. 195). The development of the plan was funded, in part, by an urban planning grant associated with Section 701 of the Housing Act of 1954³. In addition to expanding the Federal Housing Administration (FHA) mortgage insurance program, Section 701 of the Act created a Comprehensive Planning Assistance Program to encourage the use of long-range and land use planning in local decision making. This program marked a shift from top-down land use planning and played a major part in the establishment of municipal, regional, and state levels⁴.

² In 2021, Washington State passed Engrossed Second Substitute House Bill (E2SHB) 1335, which tasked Eastern Washington University and the University of Washington with finding all of the racially restrictive covenants in the state and informing property owners of how to remove them from their titles.

³ The Housing Act of 1954 was an update to the Housing Act of 1949, which provided loans to cities to acquire and clear slums for private redevelopment. Communities of color were disproportionately impacted and displaced as a result. The 1954 update also prioritized housing for the displaced, construction of new public housing and reduced the income limit for public housing.

⁴ Hammer, Greene, Siler Associates; "Planning Effectiveness and 701: An Evaluation. Prepared for the Department of Housing and Urban Development". October 13, 1967. Available online at: <https://www.huduser.gov/portal//portal/sites/default/files/pdf/Planning-Effectiveness-and-701-an-Evaluation.pdf>

Exhibit 2: Tacoma Redlining Map, 1937



The initial grants appear to have had few requirements associated with them. It was only after an update in 1968 that a housing element was required, including a requirement to plan for housing for all income and minority groups⁵. While the 1964 Plan preceded these requirements, the plan described existing and future conditions with a wide variety of housing forms:

Residential Developments Goal 1: "The Town of Bonney Lake should have residential developments, at appropriate locations, allowing for choice and variety... it is the desire to provide for some integration of different types of residences such as apartments in low and high rise buildings and town houses together with single family dwelling units" (pg. 2).

"Permitted in some areas of Bonney Lake are mobile homes (house trailers) which are a significant part of the Town's housing. Mobile homes can be bought for a low down payment and placed upon a lot being bought under contract. Thus almost 5% of the housing in Bonney Lake consists of mobile homes" (pg. 6).

"... well built apartment houses should be encouraged... apartment houses away from commercial areas can add diversity to the Town... Town house developments should be encouraged in Bonney Lake" (pg. 14).

In 1985, the Comprehensive Plan was updated and included two goals that supported equitable housing (pg. 11)⁶:

Residential Development Goal 3. Assure good housing and promote a safe healthful and decent living environment for all residents of Bonney Lake.

Residential Development Goal 4. Provides for a variety of residential types and densities to meet the needs of, and provide for, affordable choices for citizens of varied income levels within the community.

Residential Development Policy 7. Provide equal opportunities for people seeking adequate housing. Encourage innovative housing programs for low and moderate income families within the community.

The timing of incorporation and the foundation of land use planning in Bonney Lake likely played some role in minimizing the discrepancy in outcomes amongst various racial and ethnic groups observed in this report.

⁵ Roger J. Dennis and Leonard S. Rubinowitz; "School Desegregation Versus Public Housing Desegregation: The Local School District and the Metropolitan Housing District". Urban Law Annual, Volume 10, 1975. Available online at: https://openscholarship.wustl.edu/law_urbanlaw/vol10/iss1/4

⁶ While some goals and policies in the 1985 encouraged planning for all, others served assign greater importance to single-family dwelling units and burden new multi-family housing development with absorbing the sole cost of buffers between the uses.

2.2 CURRENT PLANNING CONTEXT

In 2021, the Washington State Legislature changed the planning requirements for housing through Engrossed Second Substitute House Bill (E2SHB) 1220⁷. The updated statute in Revised Code of Washington (RCW) 36.70A.020(4) strengthened the GMA housing goal from “encourage affordable housing” to “plan for and accommodate” housing affordable to all income levels.

This means that local governments now must go beyond simply encouraging affordable housing and must actively “plan for and accommodate housing” affordable to all economic segments of the community. E2SHB 1220 also updated how jurisdictions must plan for housing in the Housing Element section of their comprehensive plans, requiring local governments to make more detailed plans for housing, especially for the lowest income segments, and to address zoning that may have a racially disparate or exclusionary effect and address patterns of disinvestment.

Specifically, the new requirements in RCW 36.70A.070(2) state that jurisdictions must now adopt a housing element that:

(e) Identifies local policies and regulations that result in racially disparate impacts, displacement, and exclusion in housing, including:

(i) Zoning that may have a discriminatory effect;

(ii) Disinvestment; and

(iii) Infrastructure availability;

(f) Identifies and implement policies and regulations to address and begin to undo racially disparate impacts, displacement, and exclusion in housing caused by local policies, plans, and actions;

(g) Identifies areas that may be at higher risk of displacement from market forces that occur with changes to zoning development regulations and capital investments; and

(h) Establishes anti-displacement policies, with consideration given to the preservation of historical and cultural communities as well as investments in low, very low, extremely low, and moderate-income housing; equitable development initiatives; inclusionary zoning; community planning requirements; tenant protections; land disposition policies; and consideration of land that may be used for affordable housing.

⁷ Available online at: <https://lawfilesexternal.wa.gov/biennium/2021-22/Pdf/Bills/Session%20Laws/House/1220-S2.SL.pdf?q=20240516102013>

This report supports Bonney Lake in demonstrating that it has taken reasonable steps to satisfy the requirements of E2SHB 1220 and the GMA by:

- **Analyzing data** to better understand current housing patterns in Bonney Lake and determine if there are racially disparate impacts, displacement, and exclusion in housing.
- **Identifying local policies and regulations** that result in racially disparate impacts, displacement, and exclusion in housing.
- **Recommending new policies and regulations** to prevent housing displacement and begin to undo the impacts of local policies and regulations that result in racially disparate impacts, displacement, and exclusion in housing.

2.3 DEFINITIONS FROM COMMERCE GUIDANCE

The following terms used in E2SHB 1220 and this report are defined as follows:

- **Discriminatory effect:** The effect, regardless of intent, of differentiated outcomes for a group based on a protected classification. May be an action or failure to act. Protected classifications include race/color, national origin, religion/creed, sex/gender/domestic violence status, familial status, disability, marital status, sexual orientation, and military/veteran status.
- **Disinvestment:** A process by which a community is not prioritized for investment, or by which a system, policy, or action disincentivizes investment in a specific area. Disinvestment processes occur over time, often in the long term.
- **Displacement:** The process by which a household is forced to move from its community because of conditions beyond their control.
 - Physical displacement: Households are directly forced to move for reasons such as eviction, foreclosure, natural disaster, or deterioration in housing quality.
 - Economic displacement: Households are compelled to move by rising rents or costs of home ownership like property taxes.
 - Cultural displacement: Residents are compelled to move because the people and institutions that make up their cultural community have left the area.

- **Displacement risk:** The likelihood that a household, business, or organization will be displaced from its community.
- **Exclusion in housing:** The act or effect of shutting or keeping certain populations out of housing within a specified area, in a manner that may be intentional or unintentional, but which leads to non-inclusive impacts.
- **Inclusionary zoning:** A regulatory tool that requires permanent affordable units to be included within new residential development projects or requires payment for construction of such units elsewhere (fee-in-lieu). "Permanent" refers to affordable unit availability in the long term, specifically, for 50 years as defined by Washington code.
- **Infrastructure:** The facilities and systems that serve a country, city, or area, such as transportation, parks, communication systems, energy and utility systems, and schools.
- **Land disposition policies:** Conversion of underutilized and surplus public land for other uses, guided by state law. State law has identified affordable housing as a public benefit and allows cities to sell or lease land at a reduced cost, or donate it altogether, for development of affordable housing.
- **Market forces:** Economic factors that impact the provision, price and/or demand for housing.
- **Racially disparate impacts:** When policies, practices, rules, or other systems result in a disproportionate impact on one or more racial groups.
- **Tenant protections:** Includes legal protections for people who pay rent for the place where they live. In Washington state, legal protections are established under the Residential Landlord-Tenant Act (RCW 59.18). Local governments can establish additional protections for people who rent the place they live.

3. IMPACT ASSESSMENT

This section of the report provides an assessment of current housing and demographic conditions in Bonney Lake using multiple data sources and approaches, based on the Commerce Guidance. The assessment provides valuable information on the nature and degree of impacts, as well as factors contributing to disparities and areas at a higher risk of displacement.

By understanding these impacts, community members, and policymakers can develop policies and regulations to address racially disparate impacts, displacement, and exclusion in housing.

3.1 COMMUNITY PROFILE

As of 2021, the estimated population of Bonney Lake was 23,510. Since 2011, the city has grown at an average annual rate of 2.97%, over double the countywide rate of 1.42%.

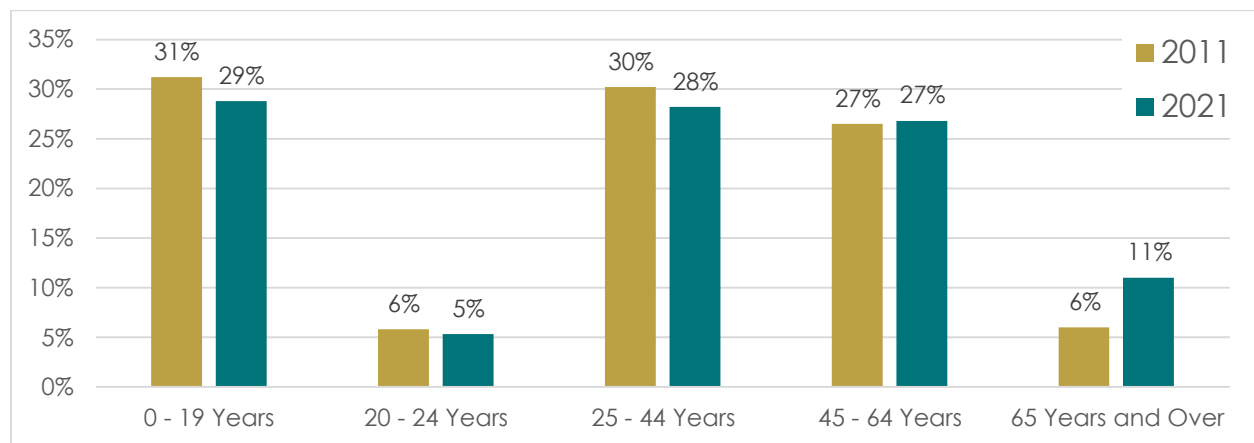
Exhibit 3: Population in Bonney Lake and Pierce County, 2011-2021

	2011	2021	Change	Annual Average Growth Rate
Bonney Lake	17,545	23,510	5,965	2.97%
Pierce County	806,190	928,200	122,010	1.42%

Source: Washington State Office of Financial Management (OFM), April 1 Population of Cities, Towns and Counties, 2011, 2021.

Note: Bonney Lake 2021 estimate Includes an estimated 188 persons added due to annexations.

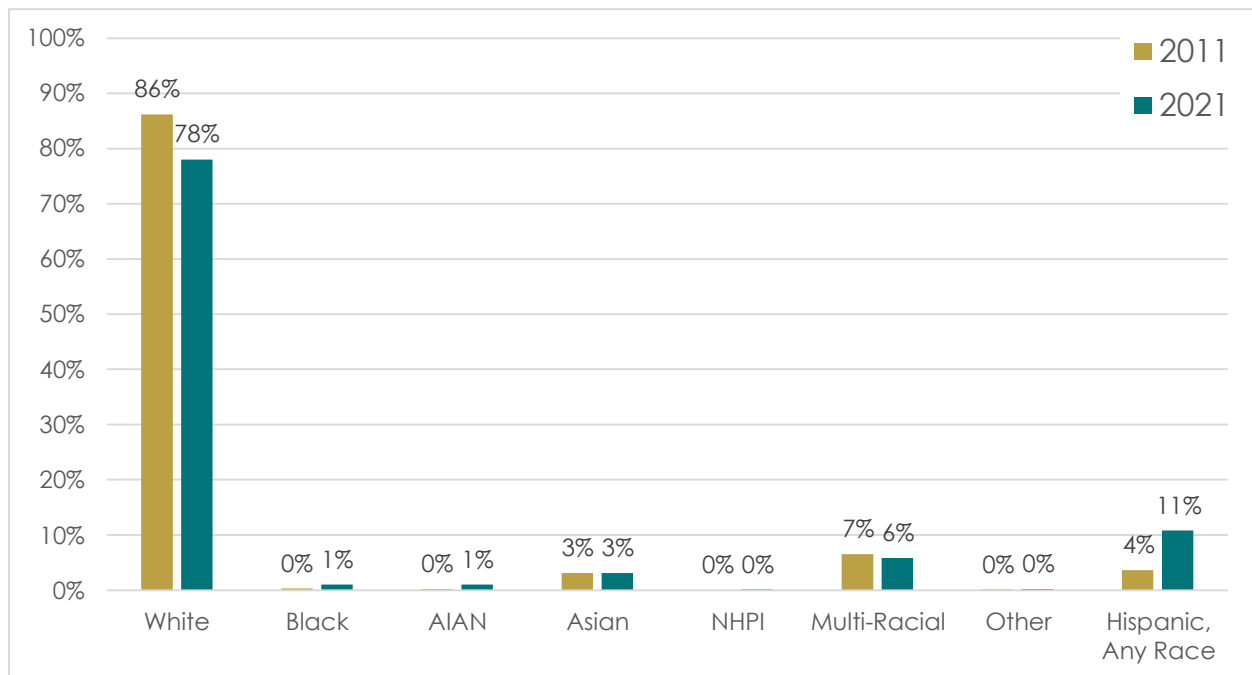
Exhibit 4: Population by Age, Bonney Lake, 2011 and 2021



Source: ACS Table DP-05, 2011, 2021

Overall, Bonney Lake residents have gotten older from 2011 to 2021 (**Exhibit 4**). Residents 24 years and under, children and young adults, account for 34% of the population, decreasing from 37% in 2011. Adults between 25 to 64 years account for 55% of the population and show a slight decrease from 57% in 2011. Seniors, or adults aged 65 and over, almost doubled to 11%. In 2021, the median age of Bonney Lake residents was 36.7, just slightly older than the median age in Pierce County of 36.4.

Exhibit 5: Race and Ethnicity of Residents, Bonney Lake, 2011 and 2021



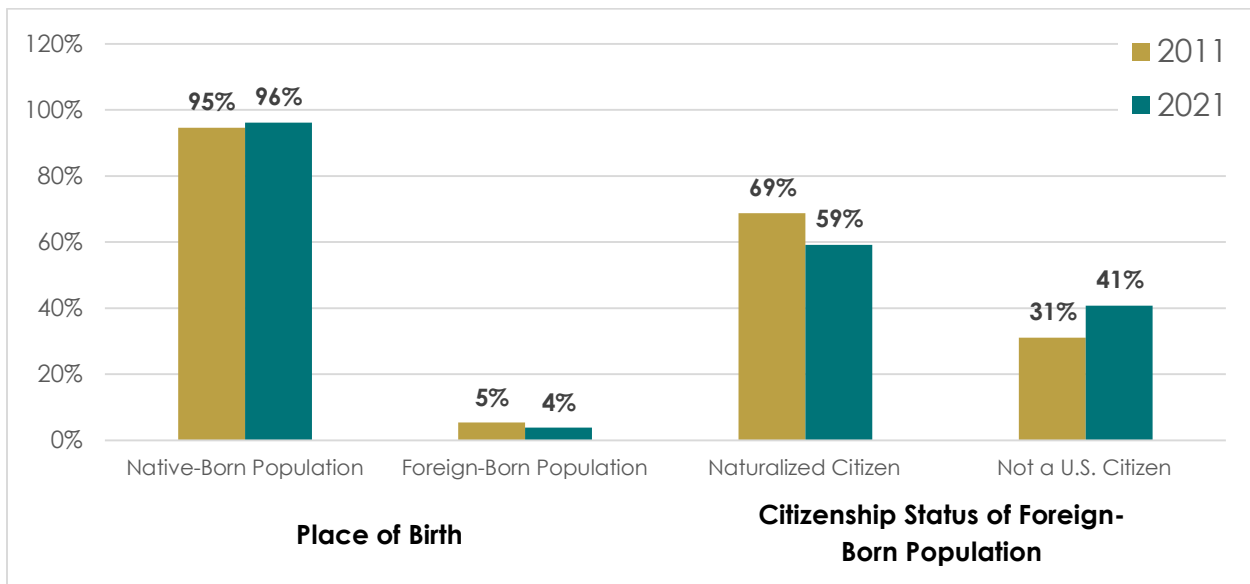
Source: American Community Survey (ACS) Table DP-05, 2011, 2021

AIAN: American Indian and Alaskan Native

NHPI: Native Hawaiian and Pacific Islander

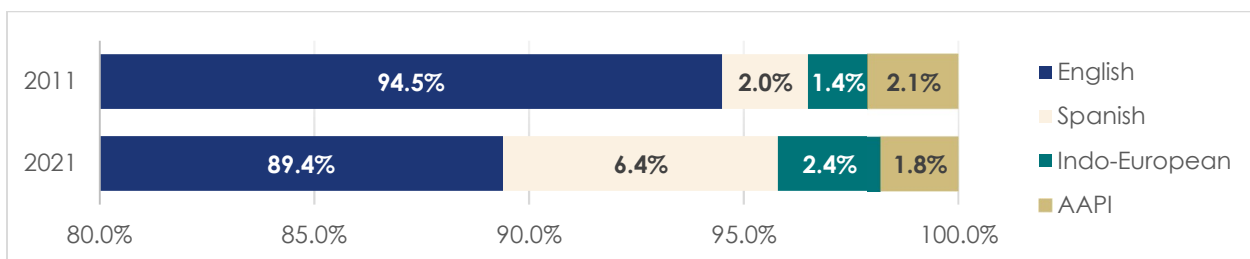
Exhibit 5 shows the racial and ethnic makeup of Bonney Lake's residential population. Between 2010 and 2021, the share of residents who are Black, Hispanic, American Indian, or Alaskan Native increased. White and multi-racial residents experienced an 8% and 1% decrease in populations, respectively. The share of Native Hawaiian, Pacific Islander, and residents who identify as a race not included here stayed consistent.

As of 2021, the majority (96%) of Bonney Lake's population was born in the United States, Puerto Rico, a U.S. territory or to a U.S. citizen (see **Exhibit 6**). Of the remaining 4% of residents who are foreign-born, or approximately 1,200, a majority (59%) are naturalized citizens, although this proportion decreased 10% since 2011.

Exhibit 6: Place of Birth and Citizenship Status of Residents, Bonney Lake, 2011 and 2021⁸

Source: ACS Table DP-02, 2011, 2021

Exhibit 7 shows that the approximately 89% of Bonney Lake's population are primarily English speakers. Increasing shares of residents speak Spanish (6.4%, an increase of 4.4% from 2011) and Indo-European languages (2.4%, up from 1.4% in 2011), while Asian and Pacific Island languages saw a decrease of approximately 0.3% from 2011 to 1.8% in 2021.

Exhibit 7: Language Spoken at Home, Bonney Lake, 2011 and 2021⁹

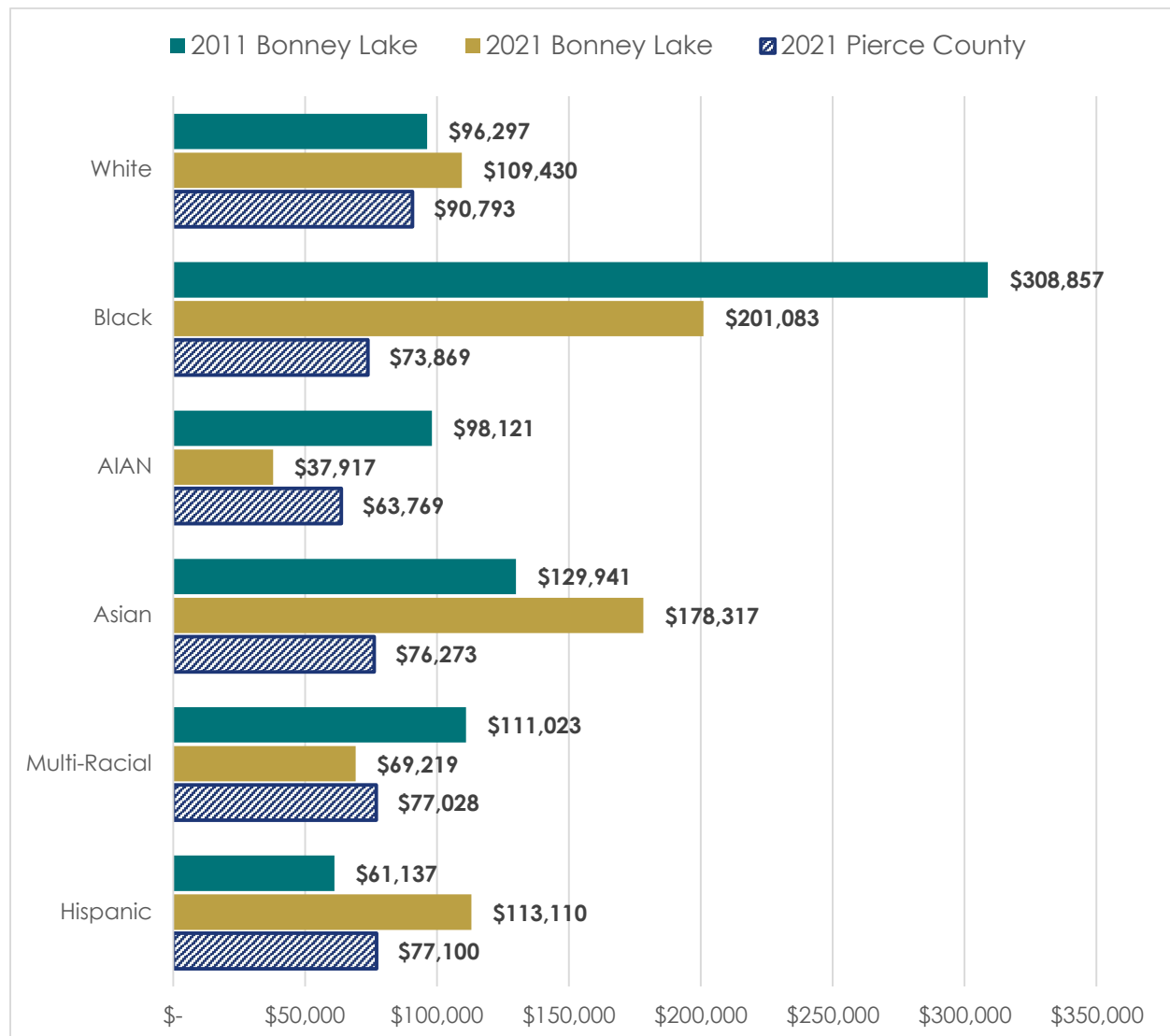
Source: ACS Table S1061, 2011, 2021

AAPI: Asian and Pacific Island languages

⁸ **Naturalized Citizen** is an individual born outside of the United States who has completed a voluntary legal process to become a U.S. citizen. **Not a U.S. Citizen** includes lawful permanent residents (immigrants), temporary migrants (such as foreign students), humanitarian migrants (such as refugees), and persons illegally present in the United States.

⁹ Other languages listed at a rate of 0.0% in both the 2011 and 2021 data sets are not shown. Indo-European languages includes languages of Germanic, Scandinavian, Slavic, Indic, Celtic, Baltic, Iranian, or Indic origin, along with French, Italian, Portuguese, and Greek.

Exhibit 8: Annual Median Household Income by Race, Bonney Lake, 2011 and 2021, and Pierce County, 2021, in 2021 Inflation-Adjusted Dollars¹⁰



Source: ACS Table S1903, 2011, 2021

Data is not available for the Native Hawaiian and Pacific Islander and Other groups in Bonney Lake and is not shown.

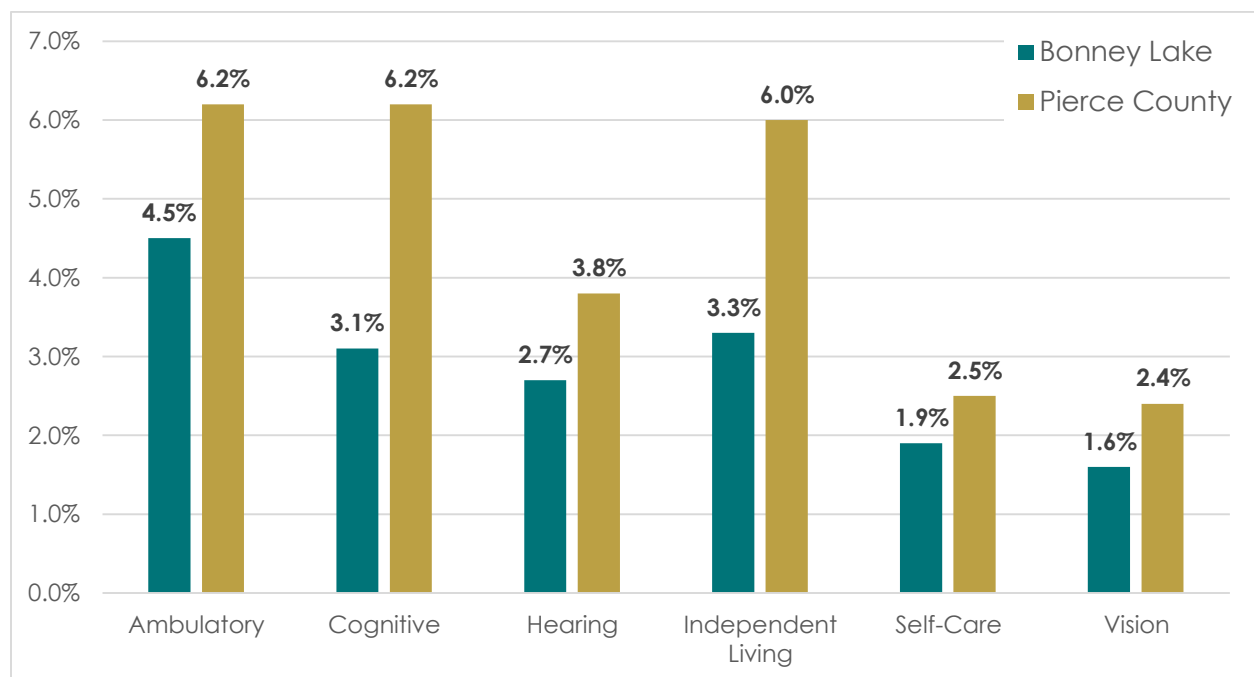
Exhibit 8 shows the change in annual median household income by race between 2011 and 2021. Black and Asian households are the highest earners, with annual median household incomes of \$201,083 and \$178,317, respectively. Black, Asian, Hispanic, and

¹⁰ Data for NHPI and Other populations unavailable due to an insufficient sample size.

White households all earned above or near the citywide annual median household income for all households of \$108,705. Asian and Hispanic households saw significant gains in annual median household income, with increases of \$48,376 and \$51,973, respectively.

American Indian, Alaska Native, and Multi-Racial households earned significantly less than the median, with annual median household incomes of \$37,917 and \$69,219, respectively. These are equivalent to 34.9% and 63.7% of the citywide annual median household income, and represent decreases of \$60,204 and \$41,804, respectively, between 2011 and 2021.

Exhibit 9: Rate and Type of Disability in Bonney Lake and Pierce County, 2021



Source: ACS Table S1810, 2021

As of 2021, 8.1% of Bonney Lake residents (1,795) live with one or more disabilities, which is lower than Pierce County as a whole (14.7%). The most common types of disabilities are ambulatory (difficulty walking or climbing stairs), independent living (difficulty completing errands alone), and cognitive (difficulty remembering, concentrating, or making decisions). Of the 1,795 Bonney Lake residents with one or more disabilities, 61.4% are aged 18-64, compared to 51.0% in Pierce County as a whole, indicating a need for accessible housing units and supportive services for young and middle-aged adults. This need will increase as the city's population ages to allow residents to age in place without being displaced.

3.2 RACIALLY DISPARATE IMPACTS

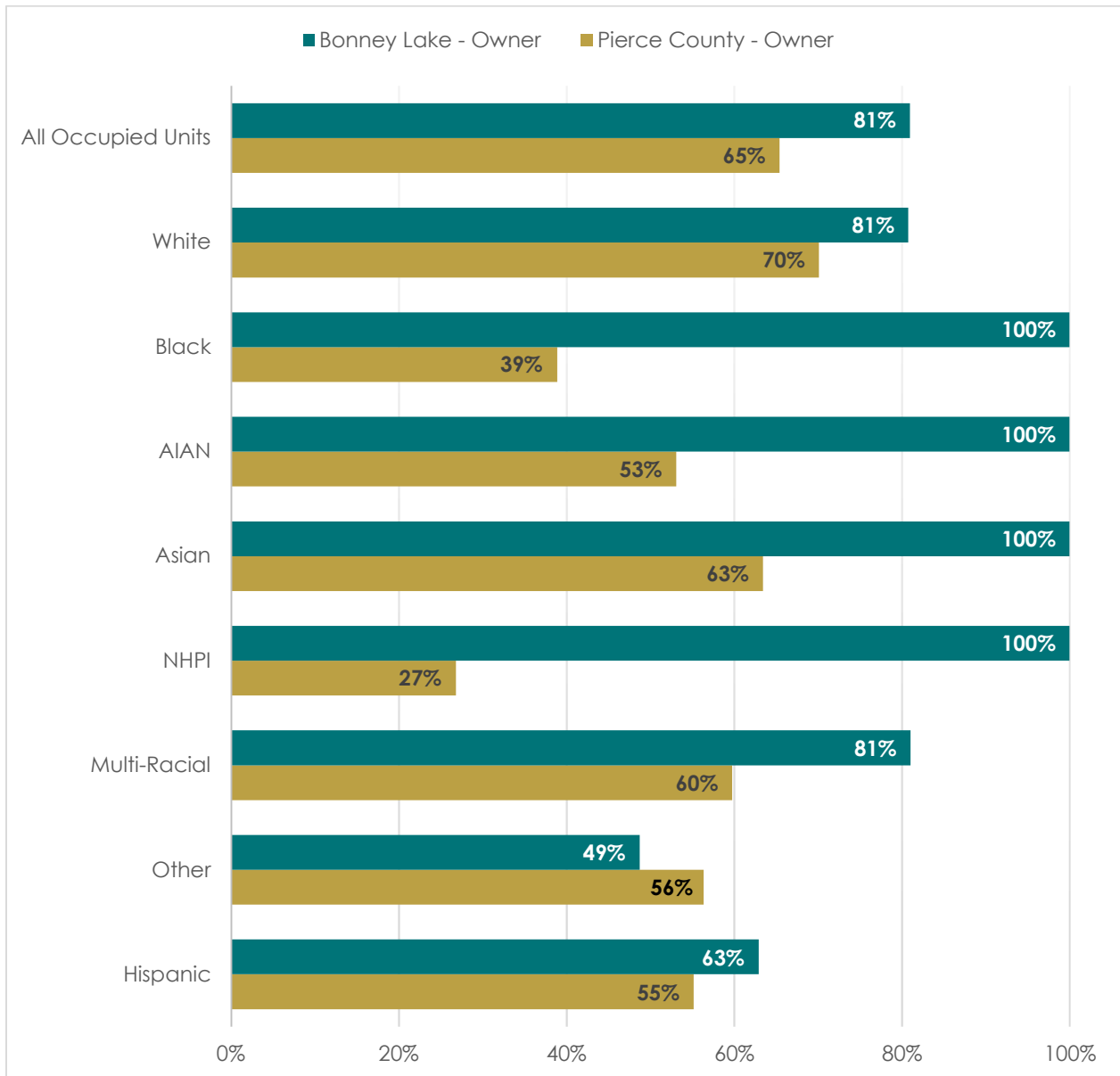
Racially disparate impacts occur when policies, practices, rules, or other systems intentionally or unintentionally result in a disproportionate effect on one or more racial groups. Racial disparities exist when policies disproportionately grant benefits to one group and burdens to another. This section examines certain metrics and data to identify racially disparate impacts among residents and groups in Bonney Lake.

Homeownership and Renter Rates

Homeownership is an important pathway to wealth building and economic stability. It can lead to intergenerational wealth transfer, improved access to credit, and greater stability in housing expenses. Understanding the disparities in homeownership rates among different racial and ethnic groups can provide insight to the challenges and opportunities faced by each group.

Bonney Lake has high homeownership rates compared to Pierce County overall (see **Exhibit 10**). While Hispanic owners of any race have higher homeownership rates than the County overall, there is a large disparity relative to other groups in Bonney Lake. Owners in the Other alone group are the least likely to own their homes in Bonney Lake.

Exhibit 10: Ownership by Race and Ethnicity, Bonney Lake and Pierce County, 2021



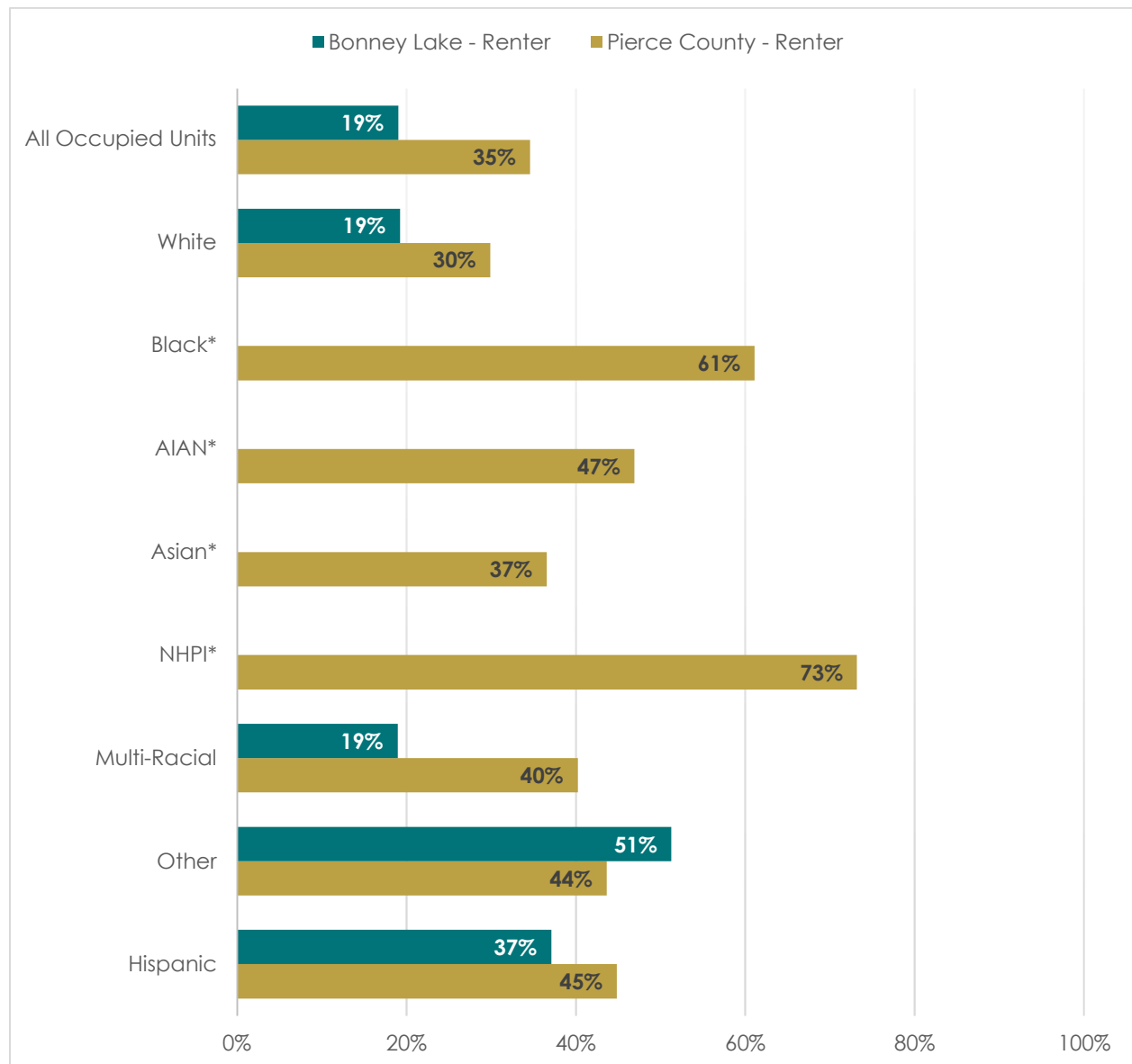
Source: ACS Table S2502, 2021

Note: White, Black, AIAN, Asian, and NHPI households include both Hispanic and non-Hispanic ethnicity.

AIAN: American Indian and Alaskan Native

NHPI: Native Hawaiian and Pacific Islander

Exhibit 11: Renter Occupancy by Race and Ethnicity, Bonney Lake and Pierce County, 2021



Source: ACS Table S2502, 2021

Notes: White, Black, AIAN, Asian, and NHPI households include both Hispanic and non-Hispanic ethnicity.

* Data for Black, AIAN, Asian, and NHPI households is 0.0%.

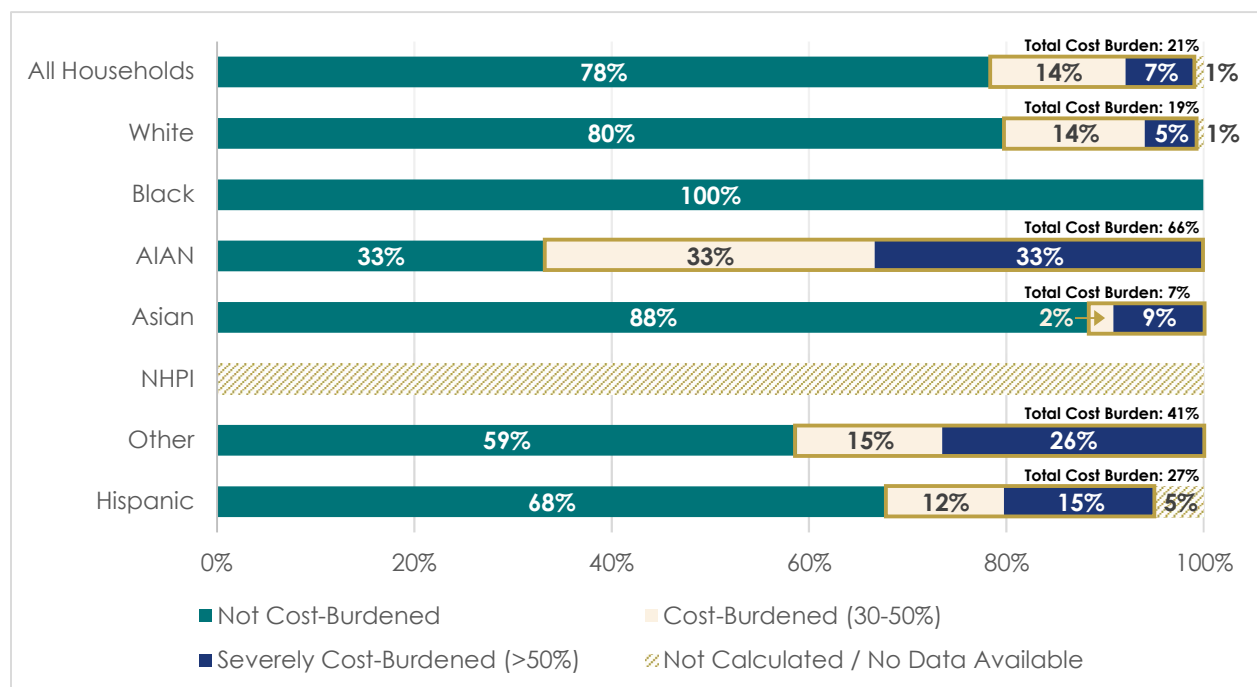
As of 2021, only 19.1% of households rent (**Exhibit 11**), almost 15% less than Pierce County overall. This share decreased 1.6% from 2011, meaning that even as Bonney Lake has added new housing units, the share of homeownership has increased.

Housing Costs and Affordability

Housing costs and affordability determine if and where households can live within a community, based on their income. They impact who has access to “areas of opportunity” in a community, including access to healthy environments, safety, recreational opportunities, education, jobs, nutrition, and other basic needs. Housing costs can be affected by the existing housing stock and are heavily impacted by land use policies, which help to determine the cost of producing housing as well as define the types and sizes of homes allowed to be built.

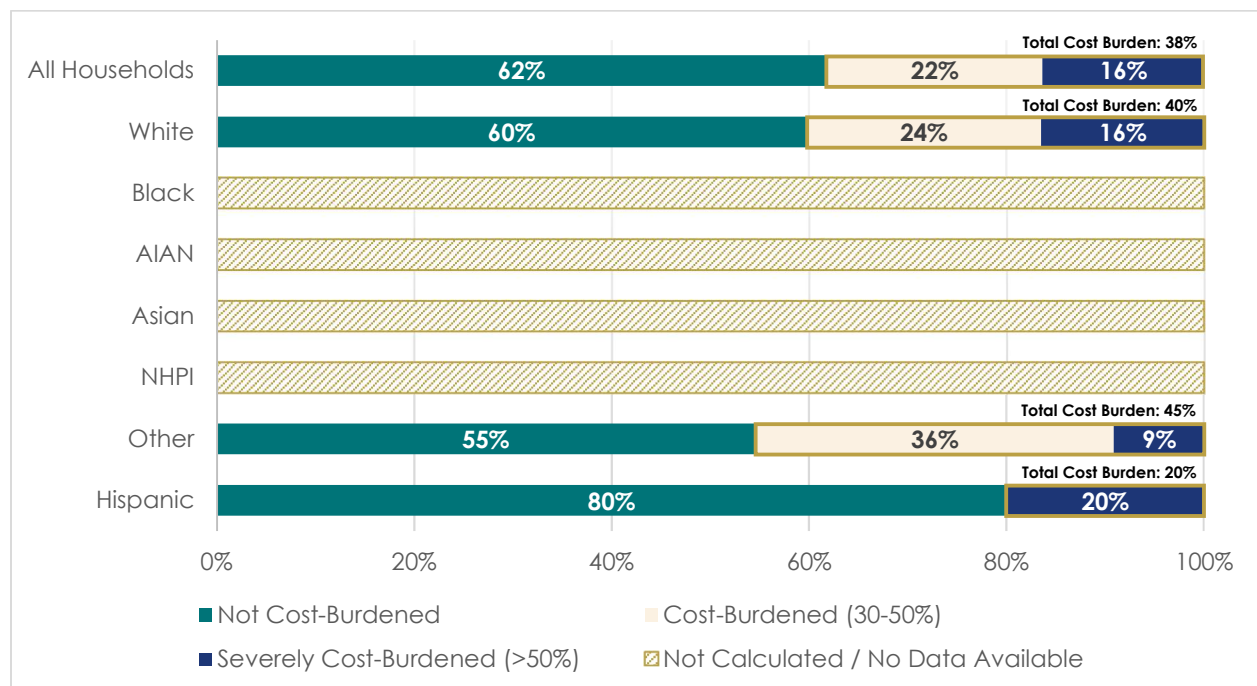
The United States Department of Housing and Urban Development defines cost burden as those households spending between 30% and 50% of total income on housing costs, including utilities. Severe cost burden is defined as households spending more than 50% of total income on housing. Understanding housing cost burdens for different racial groups, as well as the availability of suitable housing stock for different income levels, helps to illuminate racial disparities in accessibility to places of opportunity.

Exhibit 12: Rates of Cost Burden by Race for Owner-Occupied Units, Bonney Lake, 2020



Source: United States Department of Housing and Urban Development (HUD) Comprehensive Housing Affordability Strategy (CHAS) Table 9, 2016-2020

Note: Other includes multi-racial households and households that identify as another race not listed.

Exhibit 13: Rates of Cost Burden by Race for Renter-Occupied Units, Bonney Lake, 2020

Source: HUD CHAS Table 9, 2016-2020

Note: Other includes multi-racial households and households that identify as another race not listed.

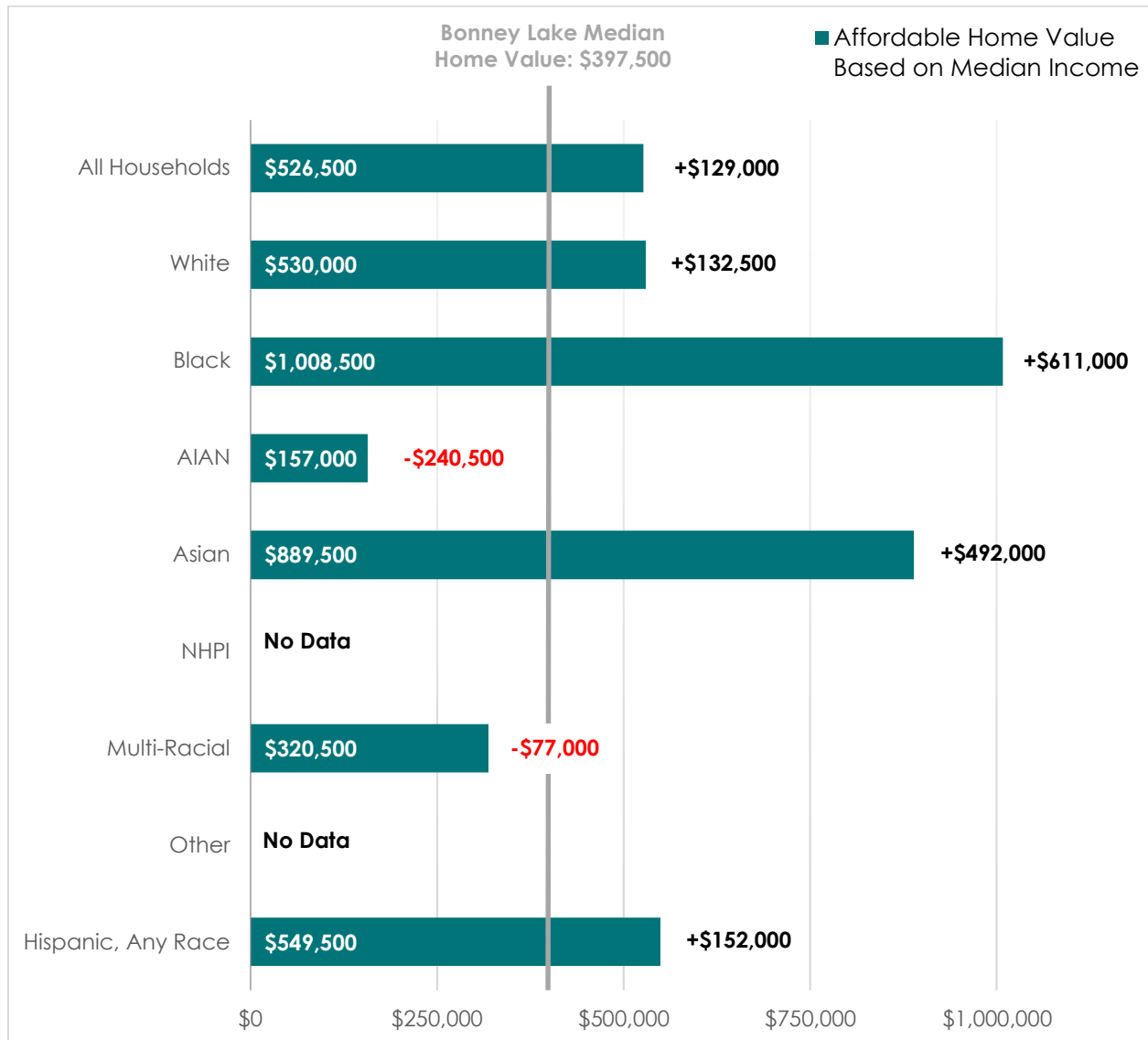
Exhibit 12 and **Exhibit 13** show the proportion of owners and renters experiencing cost burden by racial and ethnic group. The American Indian, Other, and Hispanic groups show a higher rate of cost-burden and severe cost-burden than the city overall. Under these conditions, affording routine necessities, such as food or healthcare, is a challenge, and a household that suffers a loss of income due to illness or other crisis is at greater risk of displacement due to insufficient housing options.

Exhibit 14 shows the maximum affordable home value for each racial and ethnic group based on their median household income as of 2021. This calculation assumes:

- The homebuyer will offer a 20% down payment;
- The loan will be a 30-year fixed rate mortgage with an interest rate of 3.85% (the average of weekly interest rates between June 2011 – June 2021);
- A property tax rate of 12.999% per \$1,000 (based on Pierce County Assessor 2021 Average Levy Rate for Bonney Lake);
- Annual homeowner insurance costs of \$1,141 (based on the average cost of homeowner insurance in Washington in 2021);
- Homeowner's association dues of \$100 per month; and

- A maximum monthly payment of 28% and a maximum debt-to-income ratio of 36%, consistent with mortgage lender guidelines. No debt was assumed as part of the calculation.

Exhibit 14: Affordable Owner-Occupied Housing Cost Compared to Median Home Value by Racial and Ethnic Group, Bonney Lake, 2021



Sources: ACS Tables S1903, S2506 and S2507, 2021

Pierce County Tax Rates for 2021

Federal Reserve Bank of St. Louis 30-Year Fixed Rate Mortgage Average in the United States, 2011-2021

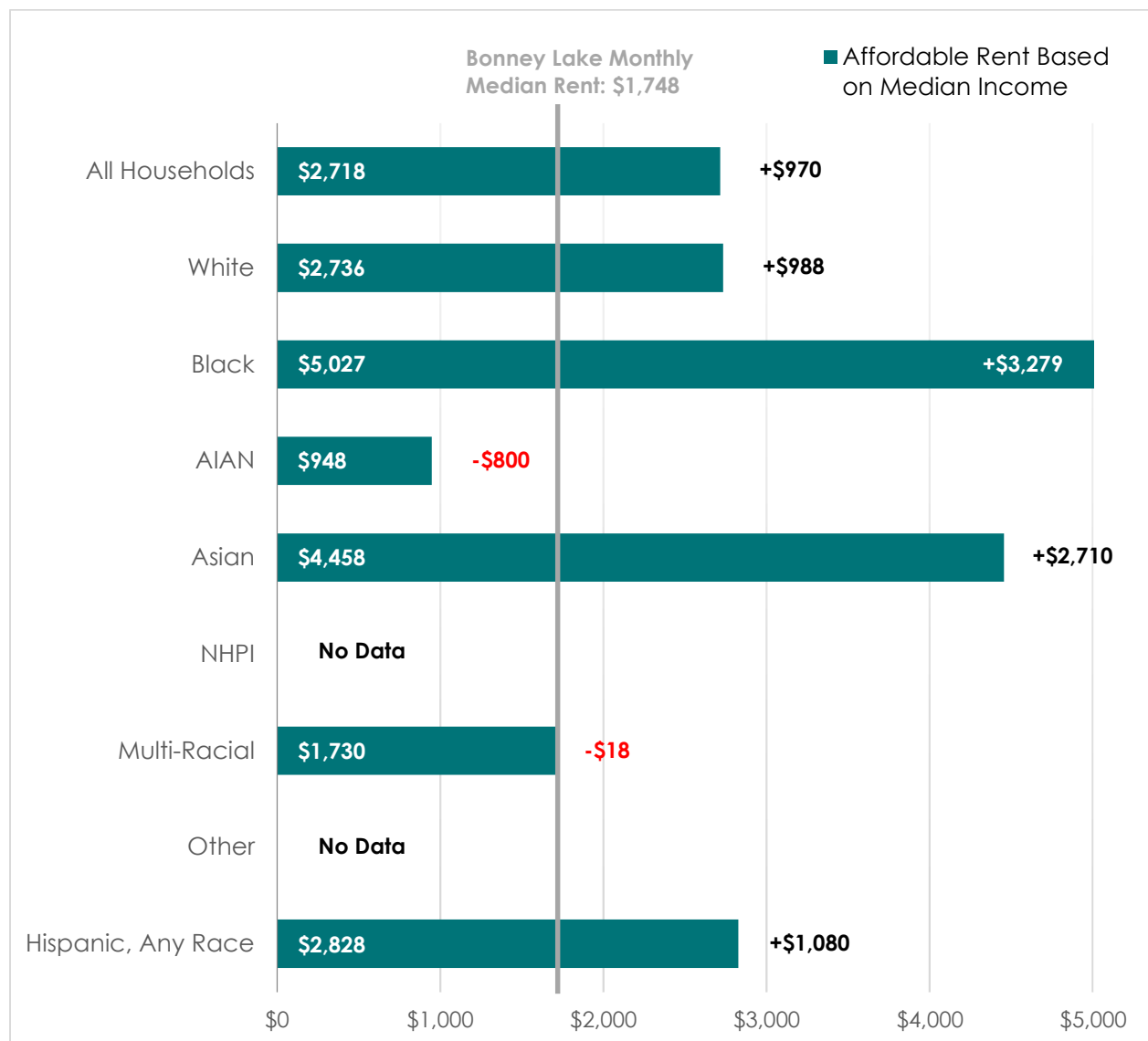
NerdWallet Average Home Insurance Cost, 2021

Federal Housing Administration Mortgage Calculator (<http://usmortgagecalculator.org>)

Note: Amounts are rounded to the nearest \$500 for display purposes.

The median home value in Bonney Lake in 2021 was \$397,500. White, Black, Asian, and Hispanic households can afford a median home in Bonney Lake based on their household income and the above assumptions. Multi-racial households can afford up to \$327,500, approximately \$77,000 below median home values. American Indian and Alaska Natives (AIAN) households have the largest disparity in the median affordable home and Bonney Lake Home value by a margin of approximately \$240,500. There was inadequate data to evaluate the Native Hawaiian or Pacific Islander and Other race categories.

Exhibit 15: Affordable Monthly Renter-Occupied Housing Cost Compared to Median Rent by Racial and Ethnic Group, Bonney Lake, 2021



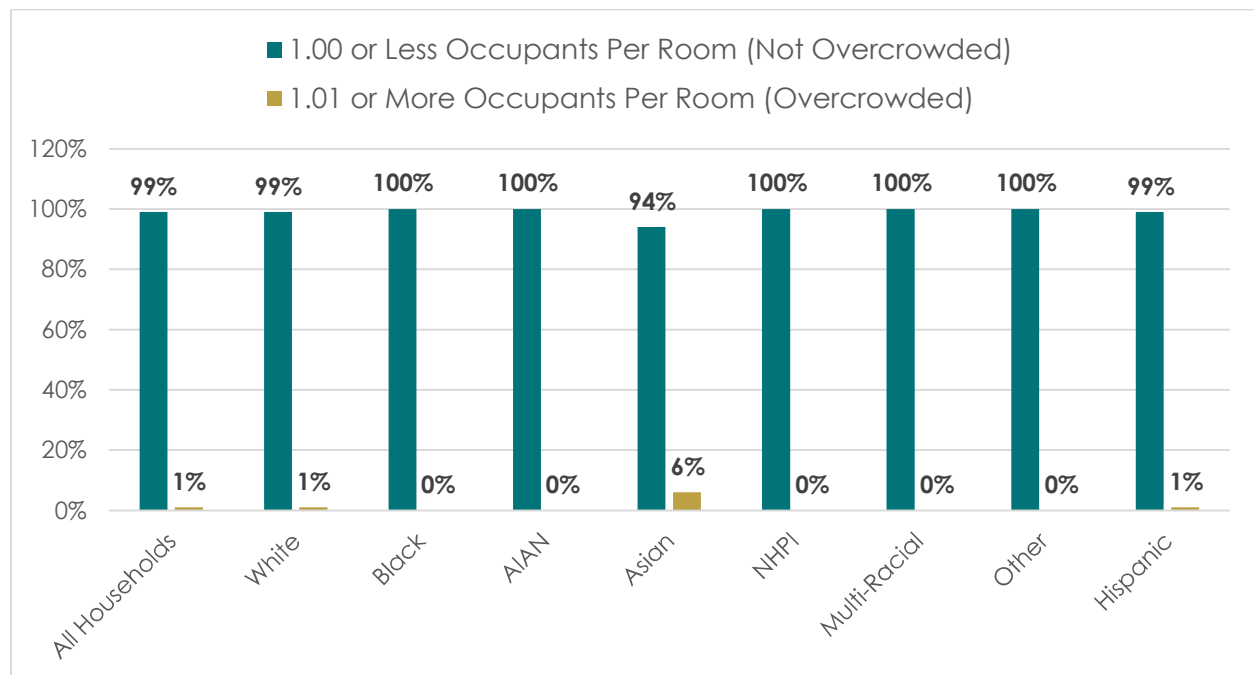
Source: ACS Table S1903 and S2503, 2021

Exhibit 15 shows the maximum affordable monthly rent for each racial and ethnic group based on their median household income as of 2021. That year, the median rent in Bonney Lake was \$1,748. White, Black, Asian, and Hispanic households can afford units at or above median rent in the city. AIAN and multi-racial households earn lower median household incomes and cannot afford the median monthly rent in Bonney Lake. There was inadequate data to evaluate the Native Hawaiian or Pacific Islander and Other race categories.

Overcrowding

Lack of affordable, suitable housing can lead to overcrowding, or the relationship between the number of people and the size of a housing unit. In the United States, multi-generational households are more common among non-white families, particularly among Asian, Black, and Hispanic Americans. Overcrowding can be an indication that the available housing stock is too expensive relative the purchasing power of households or does not match household sizes. A dwelling unit is considered overcrowded when there are more than 1.00 persons per room.

Exhibit 16: Rate of Overcrowding by Race and Ethnicity, Bonney Lake, 2021



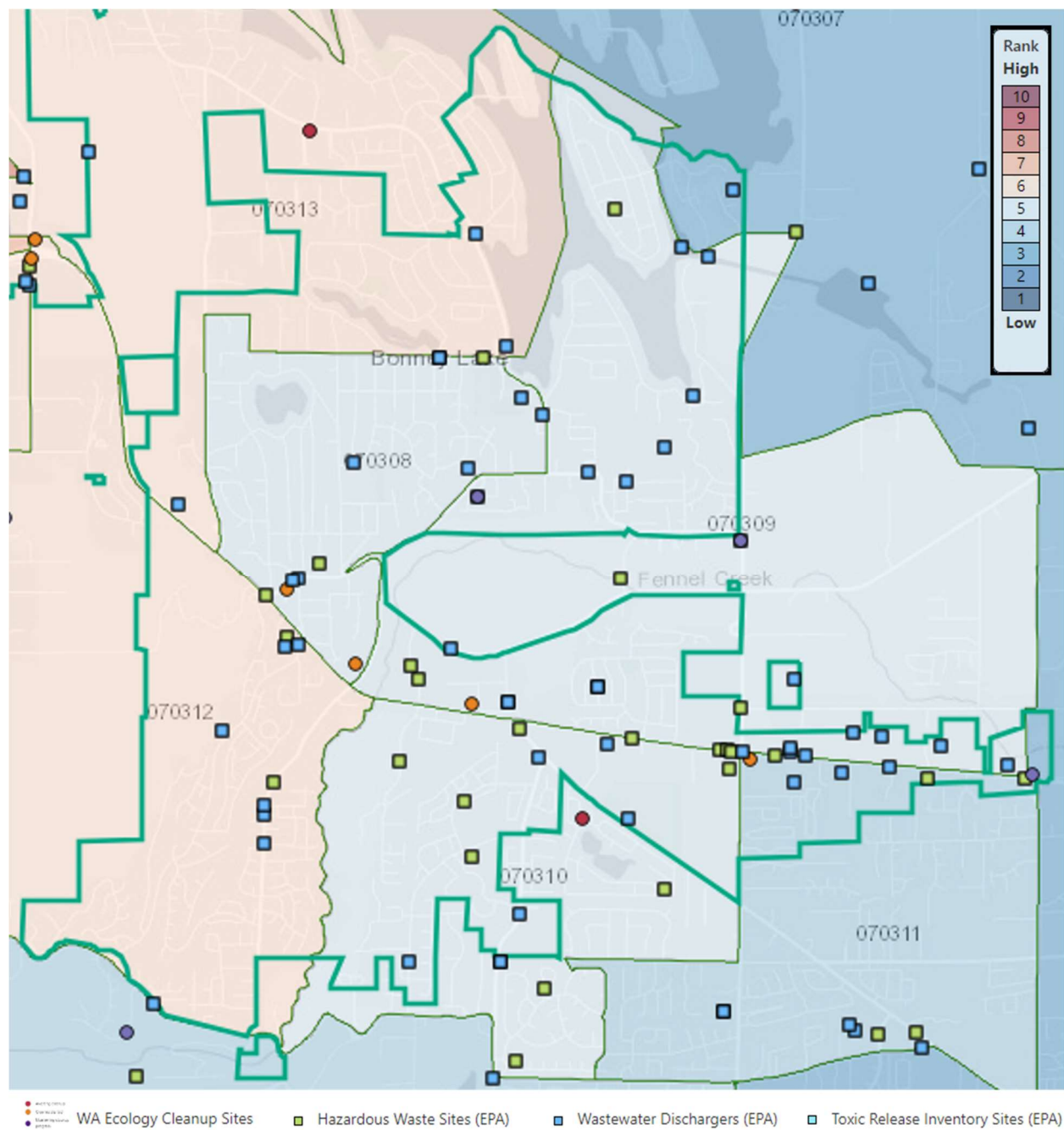
Source: ACS Tables B25014 and B25014B-1, 2021

As of 2021, overcrowding is present in approximately 113 households, or 1% of the dwelling units in Bonney Lake (see **Exhibit 16**), primarily in Asian (17) and White (96)

households. Overcrowding can be an indicator of multi-generational, extended family, or other shared housing. These housing outcomes are not inherently bad and can be a preference or a response to a housing market that does not provide adequate housing or housing in preferred configurations.

Environmental Health Hazards

Exhibit 17: Environmental Exposure Risk Index, Bonney Lake, 2024



Source: Washington Environmental Health Disparities Map, 2024 (variable data)¹¹

¹¹ <https://fortress.wa.gov/doh/wtnibl/WTNIBL/>

The Washington State Department of Health, together with the University of Washington Department of Environmental & Occupational Health Sciences (DEOHS), compiles information on environmental health and hazard risk information for each census tract in Washington. The data identifies areas that are most impacted by environmental pollution.

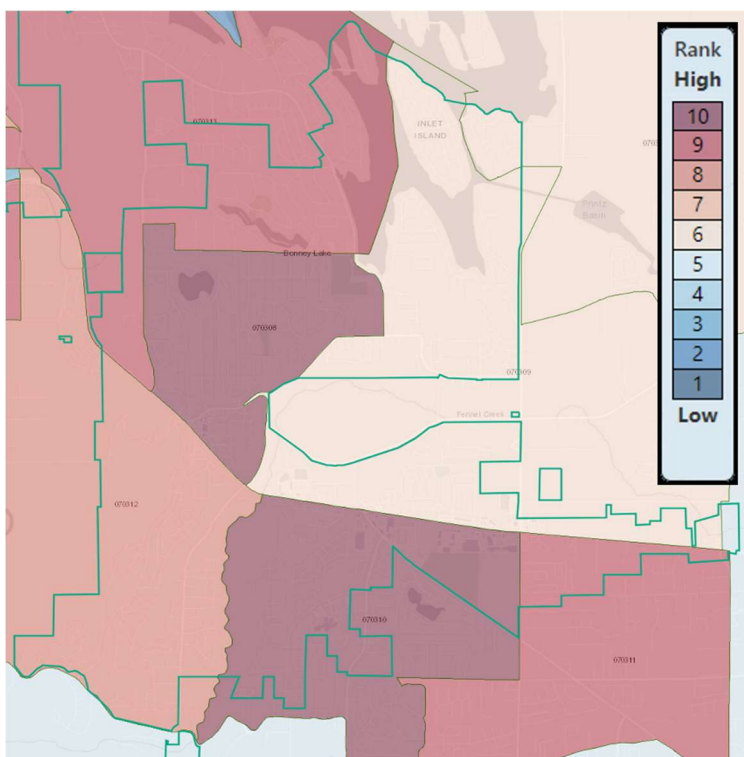
Exhibit 17 displays the environmental exposure ranking for each census tract in Bonney Lake along with locations of known environmental hazard sites. Specific environmental exposures ranked in the risk index include the following inhalable sources:

- Diesel Exhaust Emissions
- Ozone Concentration
- Particulate Matter (PM) _{2.5} Concentration (fine particulate matter 2.5 microns or less in diameter)
- Proximity to Heavy Traffic Roadways
- Toxic Releases from Industrial Facilities

Overall, residents in Bonney Lake have a moderate rate of exposure to airborne pollutants, especially compared to Pierce County overall. The data also shows moderate risk from environmental hazard sites, moderate to low risk for low birth weight, and low to very low overall risk from socioeconomic factors (language, education, race, poverty, unaffordable housing, unemployment).

Bonney Lake does exhibit high to very risk for death from cardiovascular disease (CVD), a life-long health condition that includes coronary heart disease, strokes, aortic disease, and peripheral arterial disease. CVD has many risk factors, including diet, lack of exercise, smoking, and air pollution (see **Exhibit 18**).

Exhibit 18: Death from Cardiovascular Disease, Bonney Lake, 2024

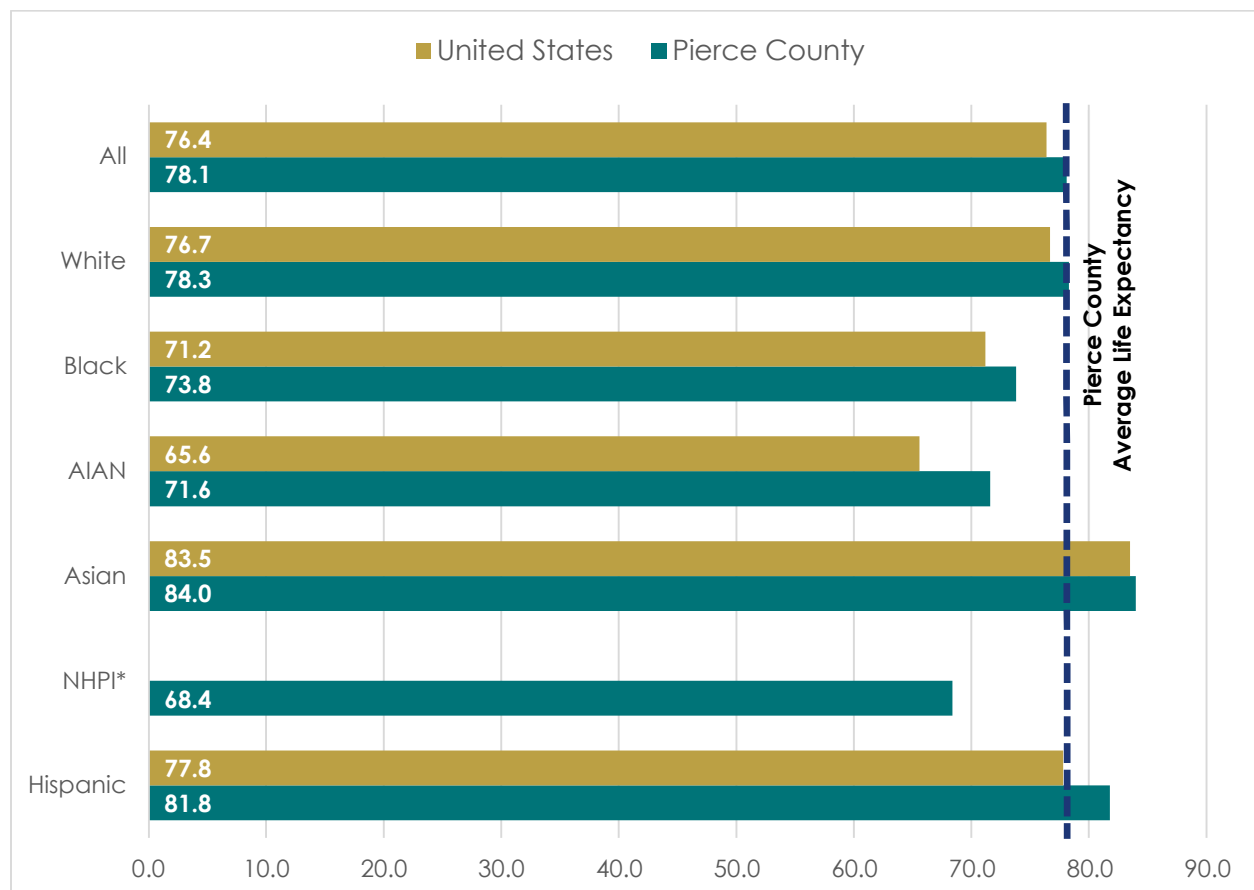


Source: Washington Environmental Health Disparities Map, 2024 (variable data)

Life Expectancy

As of 2015, life expectancy at birth of residents in Bonney Lake was approximately 78.2 years, lower than the Pierce County average of 78.5 and the Washington average of 80.3¹². By 2021, the overall trend for Pierce County showed a decline in life expectancy; however, all racial and ethnic groups in Pierce County are living longer than in the United States as a whole. Data is unavailable at the census tract level as of the writing of this report; it is unclear how much of the decline is associated with the COVID-19 pandemic.

Exhibit 19: Life Expectancy from Birth by Race and Ethnicity, Pierce County and United States, 2021¹³



Source: County Health Rankings & Roadmaps (CHR&R), University of Wisconsin Population Health Institute, Washington, 2021; United States Life Tables, 2021, National Vital Statistics Reports (Volume 72, No. 12, November 7, 2023)

Note: Data unavailable for NHPI population for United States as a whole.

¹² U.S. Life Expectancy at Birth by State and Census Tract - 2010-2015, National Center for Health Statistics: https://data.cdc.gov/NCHS/U-S-Life-Expectancy-at-Birth-by-State-and-Census-T/5h56-n989/about_data

¹³ Data unavailable for Multi-Racial and Other Groups for both Pierce County and the United States.

Educational Access

The Washington School Improvement Framework (WSIF) identifies how schools can improve the education of all students. The Framework combines multiple indicators of students' educational experiences, such as graduation rates, attendance, and proficiency on state tests in math and English language arts, into an overall score for each school. This score is used to determine the level of school improvement funding and support a school receives from the state to improve their performance and close achievement gaps.

The WSIF assigns schools within four primary categories:

- **Foundational Supports** represents a school with a strong instruction model but possibly needing focused support.
- **Tier 1** represents a school with a relatively strong instruction model but needing targeted support on improving the outcomes of one or two student groups.
- **Tier 2** represents a school needing targeted support for three or more student groups and/or for English learners.
- **Tier 3** represents a school needing comprehensive support for all student groups and/or needing support to improve the average, four-year, graduation rate to more than 67%.

Schools which are assigned a Tier and do not improve are moved to a higher Tier in the next cycle. Public schools in Bonney Lake are generally performing well and receiving minimal to targeted support. No schools require Tier 3 support as of this report.

Exhibit 20: OPSI Support Status for Public Schools within City Limits, Bonney Lake, 2021

	WSIF Support Tier	
	2017	2023
Bonney Lake Elementary	Foundational	Foundational
Emerald Hills Elementary	Foundational	Foundational
Victor Falls Elementary	Foundational	Tier 1
Lakeridge Middle School	Tier 1	Foundational
Mountain View Middle School	Foundational	Tier 2
Bonney Lake High School	Foundational	Foundational

Source: Washington Office of Superintendent of Public Instruction (OSPI), Washington School Improvement Framework Report Card¹⁴

¹⁴ <https://washingtonstatereportcard.ospi.k12.wa.us/ReportCard/ViewSchoolOrDistrict/102192>

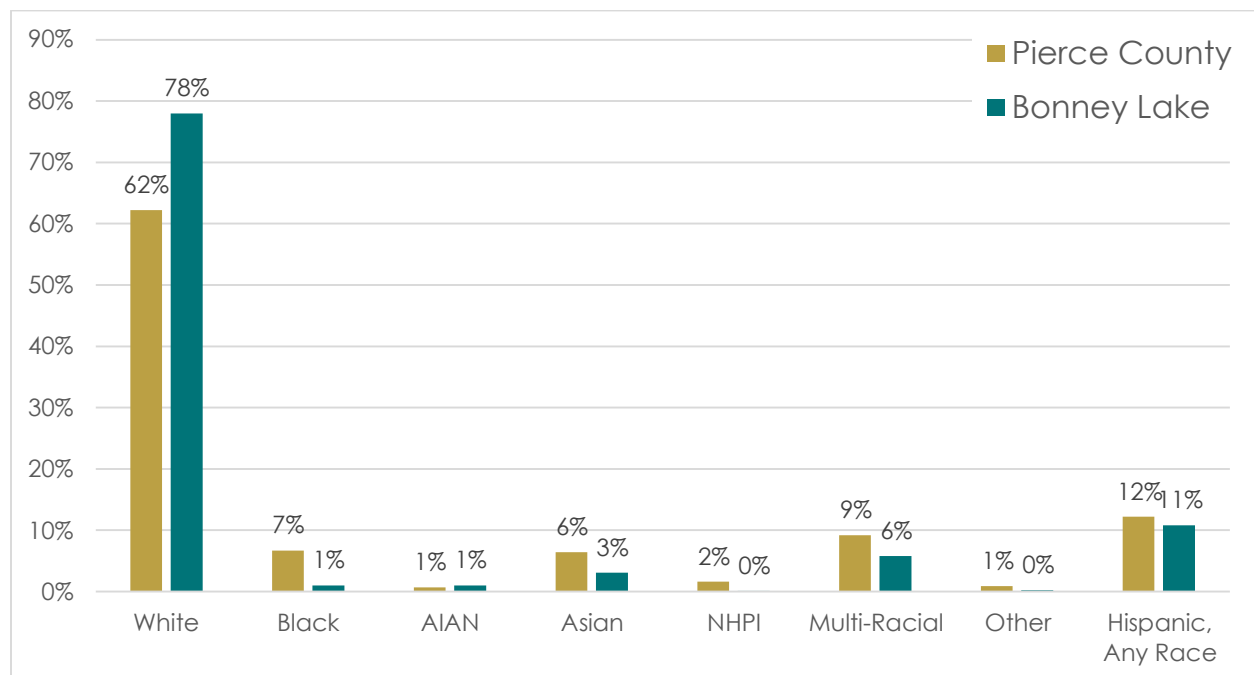
3.3 EXCLUSIONARY HOUSING

Exclusion is the act or effect of shutting or keeping certain populations out of housing within a specified area, in a manner that may be intentional or unintentional. Historically, racially restrictive covenants and redlining were forms of explicit exclusion. Exclusion did not end when federal courts found restrictive covenants unconstitutional. Regulations such as large lot zoning and lending practices, among other local, state, and federal policies, all served to further segregation. Exclusion may extend beyond race to income, ethnicity, or other sociodemographic characteristics. This section examines certain metrics and data to identify exclusionary housing impacts among residents and groups in Bonney Lake.

Residential Racial Composition

Land use regulations may be creating an exclusionary effect when the racial composition of a city varies dramatically from the racial composition of the county in which it is located. Pierce County and Bonney Lake are both majority-white, however there is a discrepancy of 16 percentage points between the city and the county. The City is proportionally overrepresented by white residents and underrepresented particularly by Black, Asian, and multi-racial residents.

Exhibit 21: Race and Ethnicity of Residents, Bonney Lake and Pierce County, 2021

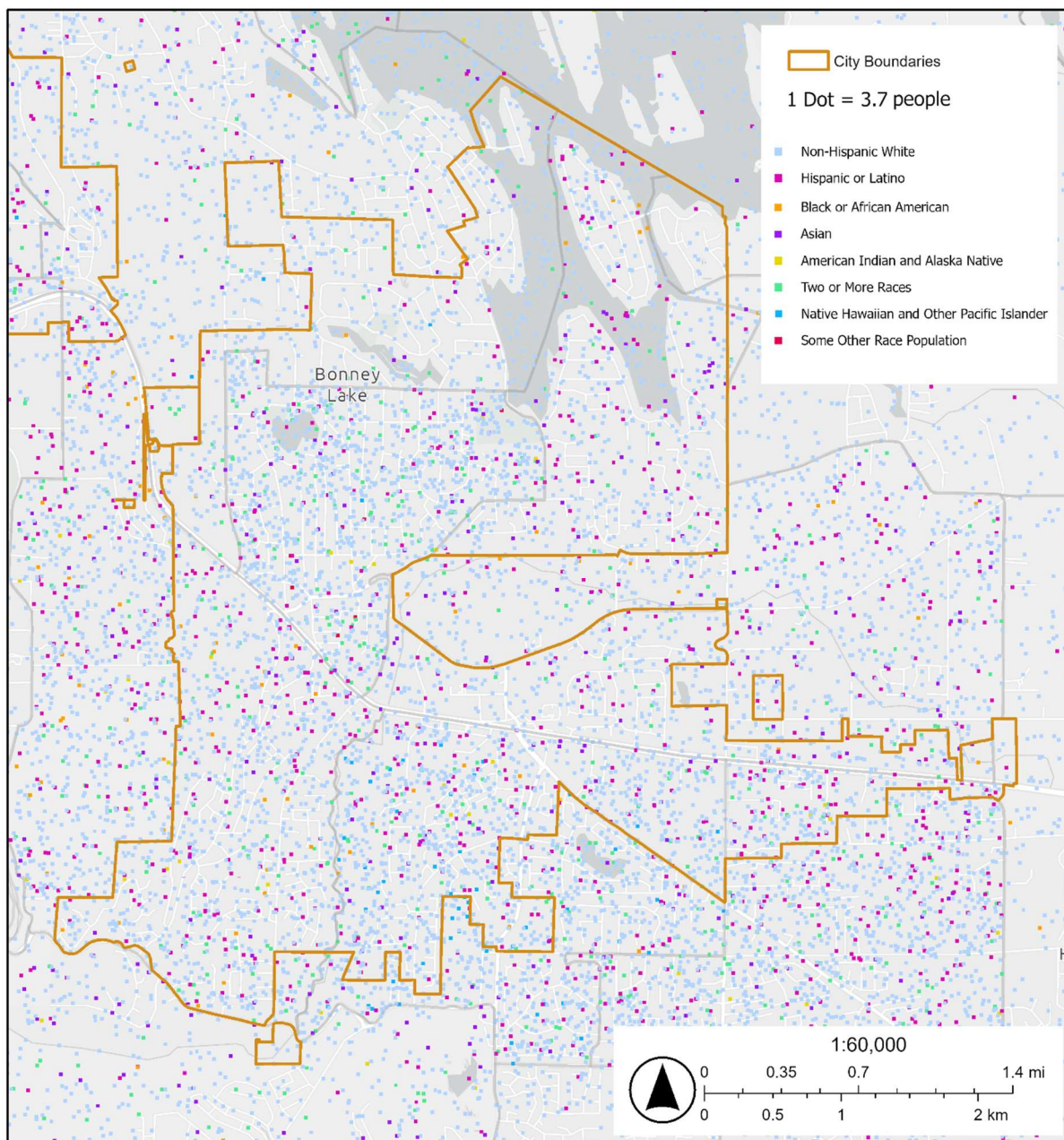


Source: ACS Table DP-05, 2011, 2021

Racial Density

Many housing patterns, as products of historical housing or other policies, display racially segregated communities. By identifying an over- or under-representation of a racial group relative to the city, patterns can be illuminated. Segregation is not observed in Bonney Lake (see **Exhibit 22**).

Exhibit 22: Race and Ethnicity by Dot Density, Bonney Lake, 2022



Note: Location of dots are randomized within Census blocks.

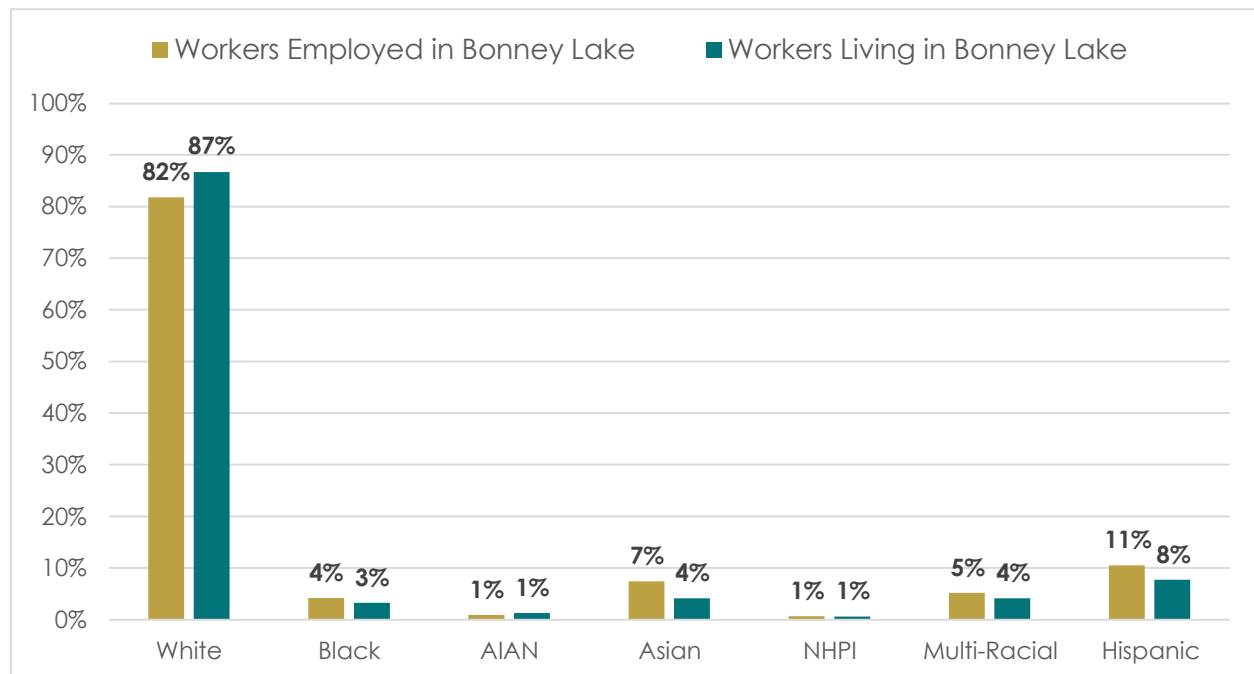
Jobs Housing Balance

A balance between available jobs and housing means that a community can provide adequate housing for those working the City and adequate jobs for those living in the city. There is adequate housing to support local employment when the ratio of total jobs to total housing units nears 1.0. An imbalance results in longer commutes (either to homes or jobs), traffic congestion, air emissions, deterioration of physical and mental health and community strength. Typically, lower-income workers absorb the costs of longer commutes. As of 2021, Bonney Lake has a jobs-to-housing ratio of 1.35.

Comparison of Workers and Working Residents

One approach to assess whether there is evidence of exclusion is to compare the demographic profile of the local workforce (the people who work in a jurisdiction) to the workers who live in a jurisdiction (the working residents). This is a more accurate comparison than comparing the workforce to the residential population since many residents do not participate in the labor force, such as children and the retired. Since people tend to make residential choices based on proximity of their employment, if there is a large disparity between the profiles, it may indicate an exclusionary effect in housing.

Exhibit 23: Racial Composition of Workers and Residential Workforce, Bonney Lake, 2021

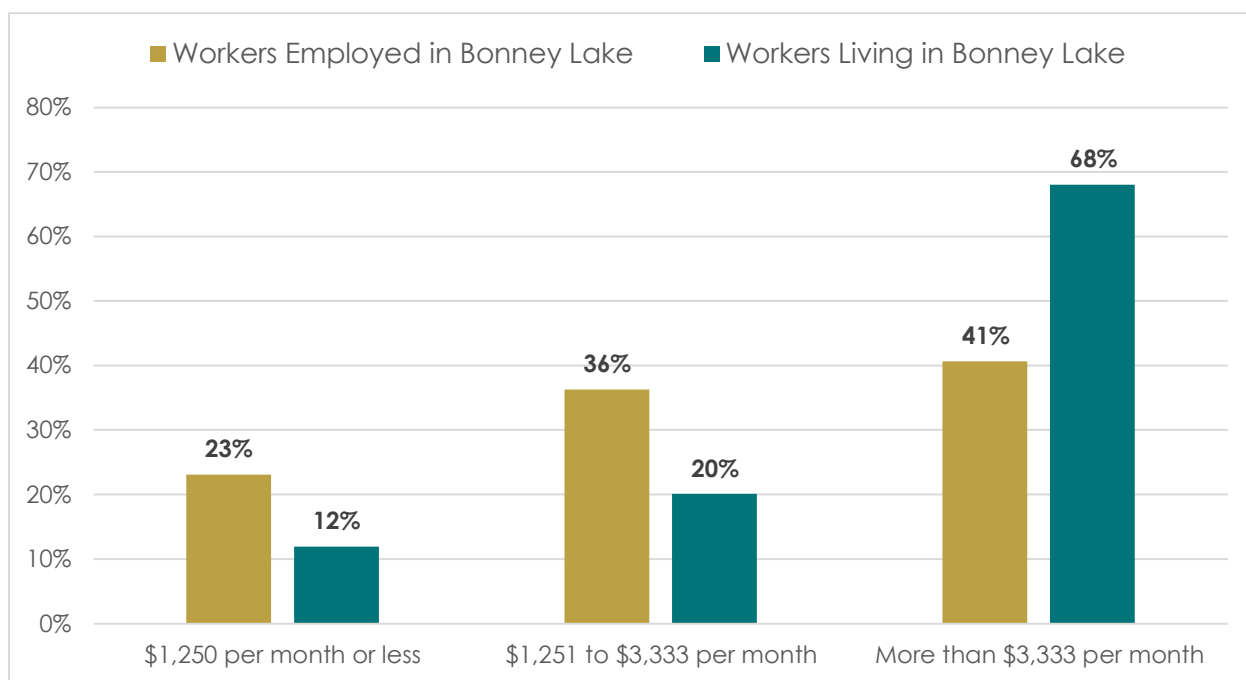


Source: US Census Longitudinal Employer-Household Dynamics (LEHD) OnTheMap, 2021

Exhibit 23 shows that the workers who live in Bonney Lake are 5% more likely to be White than the people who work in Bonney Lake. The data also shows that workers in Bonney Lake are proportionally more likely to be Black (1%), Asian (3%), multi-racial (1%), and Hispanic (3%) than those who live in Bonney Lake. If none of the people working in Bonney Lake also live in Bonney Lake, this is up to 525 workers who are potentially excluded from housing in Bonney Lake; however, there are many other reasons that individuals may choose not to live where they work and a correlation should not be drawn from the available data.

Exhibit 24 provides a comparison of wages amongst workers. Minimum wage in Washington State in 2021 was \$13.69, or approximately \$2,473 per month for a full-time worker. Up to 59% of workers are making minimum wage, indicating the presence of low-wage and/or part-time work. The highest density of workers traveling to Bonney Lake originate from within Bonney Lake, immediately southwest of the City in unincorporated Pierce County, Buckley, and Sumner (see **Exhibit 28**), a distance of five miles or less, indicating that the exclusionary effect based on wages may be low to moderate.

Exhibit 24: Wage Groups of Workers and Residential Workforce, Bonney Lake, 2021



Source: US Census Longitudinal Employer-Household Dynamics (LEHD) OnTheMap, 2021

Commute Burden

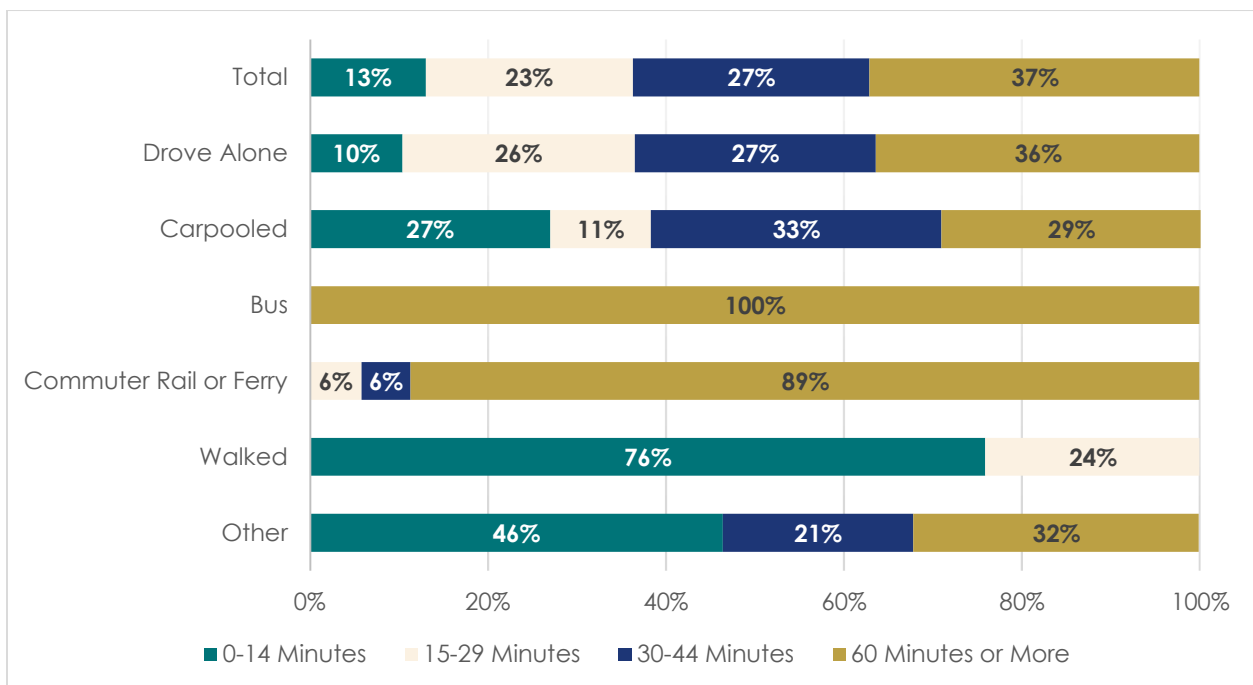
Commute patterns describe how well the existing housing serves the local workforce. When there is inadequate housing for workers, or the housing is not affordable, workers may be excluded from the communities they work in. In Bonney Lake, most workers travel 10 or more miles to work in Bonney Lake, and most residents travel 10 or more miles to work outside of the city (see **Exhibit 25**).

Exhibit 25: Distance Traveled by Workers, Bonney Lake, 2021

	Distance Traveled by Workers Employed in Bonney Lake		Distance Traveled by Workers Living in Bonney Lake	
	Count	%	Count	%
Total All Jobs	5,376	100.0%	10,147	100.0%
Less than 10 miles	2,212	41.1%	3,098	30.5%
10 to 24 miles	1,464	27.2%	3,850	37.9%
25 to 50 miles	833	15.5%	2,417	23.8%
Greater than 50 miles	867	16.1%	782	7.7%

Source: US Census Longitudinal Employer-Household Dynamics (LEHD) OnTheMap, 2021

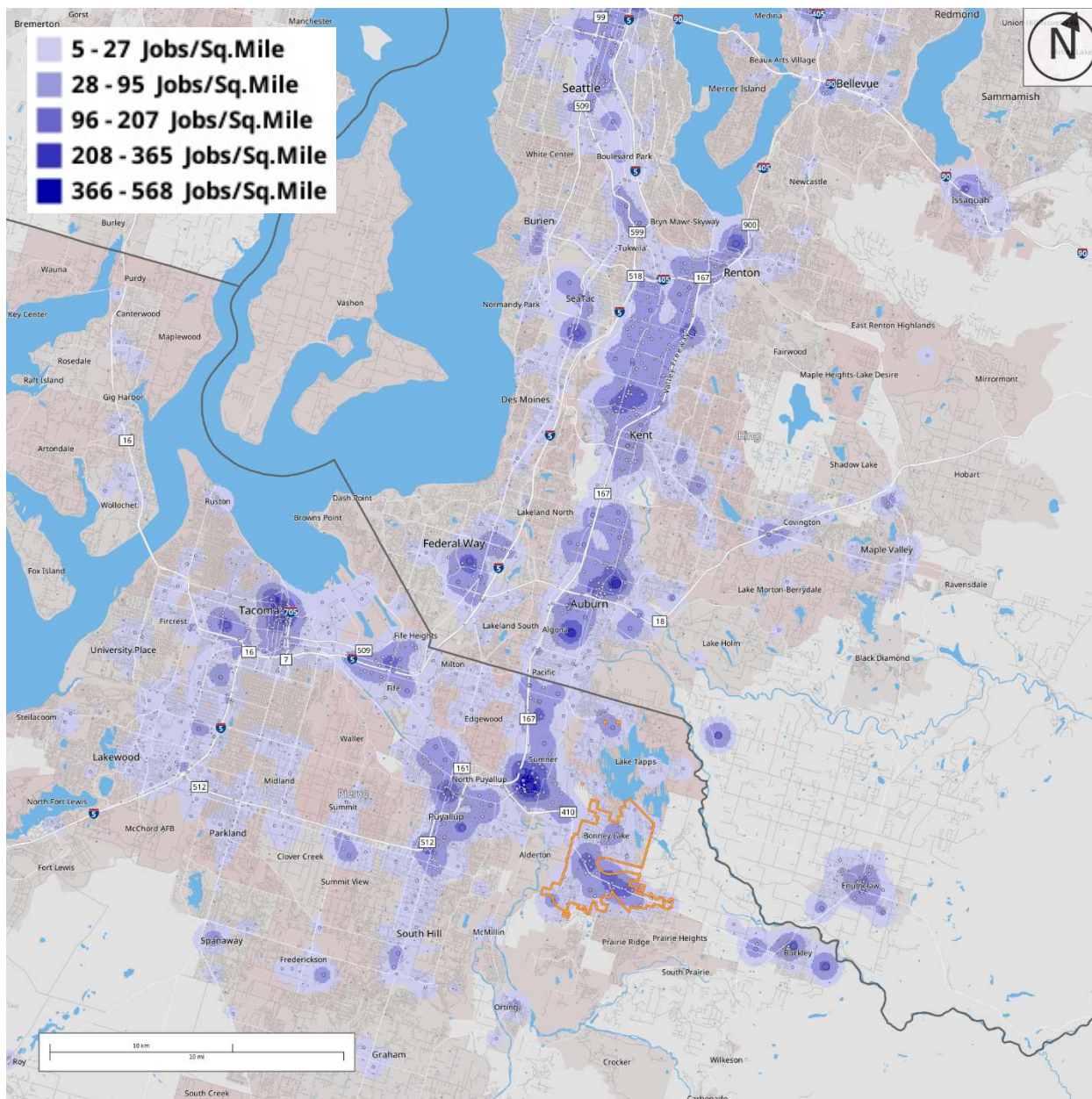
Exhibit 26: Commute Times by Means of Transportation, Bonney Lake, 2021



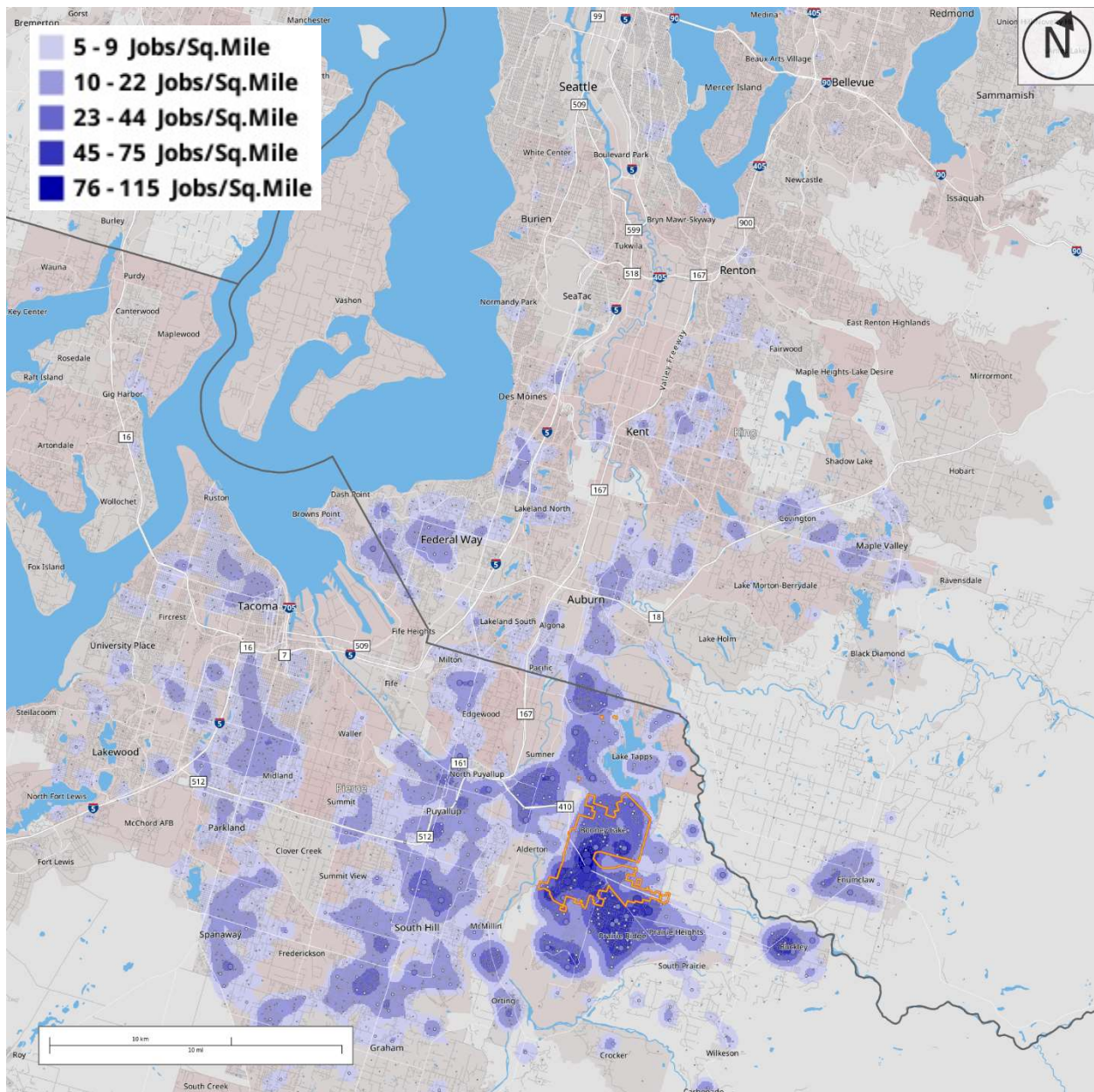
Source: ACS Table B08134, 2021

Exhibit 26 shows how workers are commuting. The proportion of commuters driving alone or carpooling are experiencing similar commute times to workers overall. Workers commuting by bus are all experiencing commutes of 60 minutes or more; as of the date of this report, bus service is only available westbound in the morning and eastbound in the evening during peak hours. Commuters connecting to light rail are also experiencing long commutes. This data is consistent with the destinations shown in **Exhibit 27**, which shows concentrations along the SR 167 and I-5 corridors at major transportation hubs.

Exhibit 27: Work Destinations from Bonney Lake, 2021



Source: US Census Longitudinal Employer-Household Dynamics (LEHD) OnTheMap, 2021

Exhibit 28: Originating Location of Workers Commuting to Bonney Lake, 2021

Source: US Census Longitudinal Employer-Household Dynamics (LEHD) OnTheMap, 2021

Workers commuting to Bonney Lake are primarily traveling from locations 25 miles or less from Bonney Lake, particularly from nearby unincorporated areas, Buckley, Sumner, and Puyallup. The ability of workers to commute to Bonney Lake may be limited by the lack of transit service to and from the City during peak commute hours.

3.4 DISPLACEMENT

Displacement is when a household is forced or pressured to move from their community by factors outside of their control. Displacement can have a life-changing negative effect on households that are directly impacted. Displacement can happen to households, businesses, and community institutions. Knowing the type of displacement that has or is occurring is important for identifying policy or regulatory options to reduce the adverse impacts of displacement.

While displacement due to rising costs is the most common form, there are many forms of displacement, including:

- **Physical displacement:** Households are directly forced to move for reasons such as eviction, foreclosure, natural disaster, or deterioration in housing quality.
- **Economic displacement:** Households are compelled to move by rising rents or costs of home ownership like property taxes.
- **Cultural displacement:** Residents are compelled to move because the people and institutions that make up their cultural community have left the area.

This section examines certain metrics and data to identify displacement risks in Bonney Lake.

Foreclosures

Foreclosures affect homeowners who are no longer able to maintain mortgage payments or renters whose property owners face foreclosure. The lender must initiate a foreclosure process, which typically happens when the borrower has missed three payments and the fourth is due (typically called the 90-Day Delinquency Rate). A mortgage foreclosure should not be confused with a tax foreclosure, which typically requires the property owner to be in default on property taxes for more than three years.

Under normal circumstances, the foreclosure rate in the United States is typically low, averaging less than 0.5% of all mortgages. The rate peaked in 2010 at 2.23% as part of the sub-prime lending crisis. In 2021, only 0.11% of all mortgages were in foreclosure¹⁵.

In Bonney Lake, five properties had foreclosure documentation recorded with the Pierce County Auditor between January 2020 and May 2024, or approximately 0.03% of housing units with a mortgage in Bonney Lake annually over this period.

¹⁵ Statista Research Department, 2022: <https://www.statista.com/statistics/798766/foreclosure-rate-usa/>

Evictions

Eviction is the process by which a household is forced to leave their housing due to a failure to meet the conditions of the leasing contract and results in displacement of that household. An eviction filing is a legal notice of an eviction suit filed by a property owner against a renter. People who have experienced eviction are at a greater risk of housing insecurity, vulnerability to exploitation and homelessness. In Bonney Lake, renters are at lower risk of eviction than in Pierce County overall (see **Exhibit 29**).

Exhibit 29: Eviction Filing Rate, Bonney Lake and Pierce County, 2018

 BONNEY LAKE WASHINGTON		 PIERCE COUNTY WASHINGTON	
0.03	0.7%	4.3	1.3%
EVICIONS PER DAY	EVICION RATE -1.07 U.S. average	EVICIONS PER DAY	EVICION RATE -0.52 U.S. average
Eviction Judgments	10	Eviction Judgments	1.6k
Eviction Filings	14	Eviction Filings	2.4k
Eviction Filing Rate	1%	Eviction Filing Rate	2%
Households Threatened	12	Households Threatened	2.3k
Households Threatened Rate	0.9%	Households Threatened Rate	1.9%

Source: Eviction Lab, Princeton University, www.evictionlab.org, 2021

Loss of Housing Units

Over time, housing units may need to be demolished due to disrepair and functional obsolescence. Ideally, lost housing would be replaced by new housing in better condition. However, with this change in housing stock, households can be displaced if they are not able to afford the new housing, or the new housing is in a form or configuration that does not meet their needs.

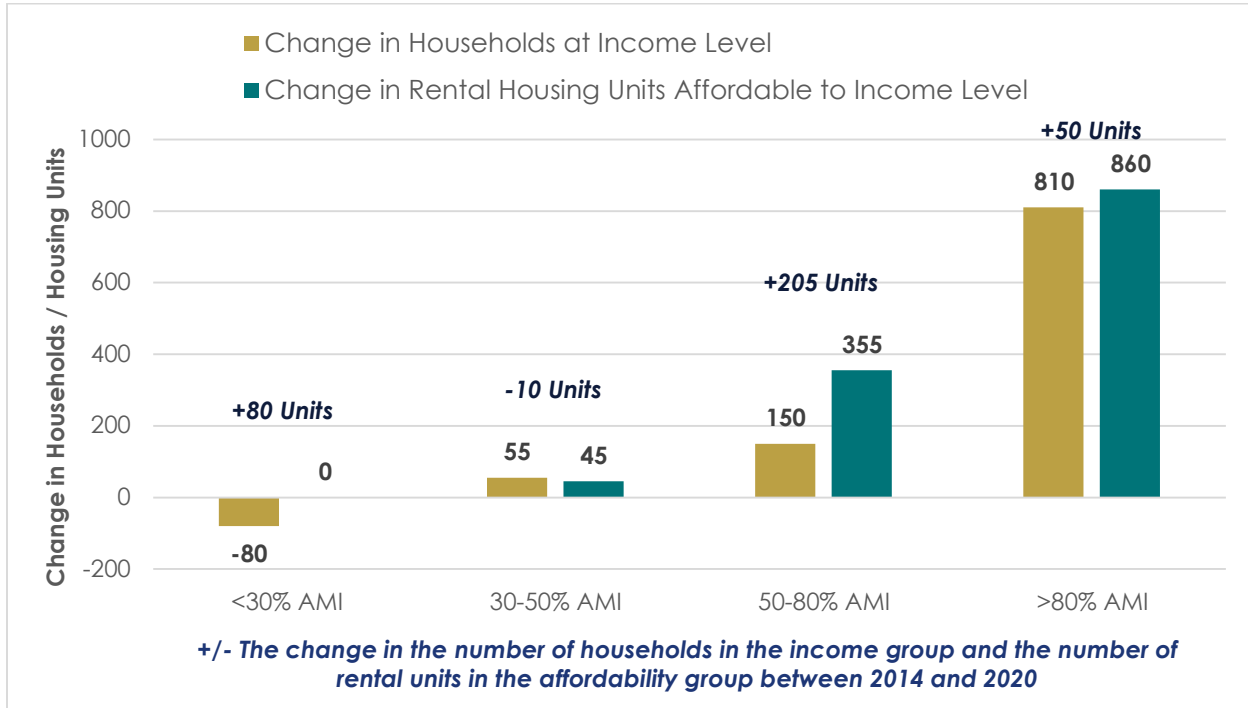
Exhibit 30 analyzes whether there was a loss of housing units in Bonney Lake between 2011-2021. There was a net increase of 1,926 units, and an increase in each category, indicating that populations were likely not displaced due to loss of housing options.

Exhibit 30: Net Change in Housing by Type, Bonney Lake, 2011 – 2021

Housing Type	2011	2021	Change
Single-Family Detached	5,182	6,525	+1,343
Townhouses / Multi-Family (2-4 Units)	420	666	+246
Multi-Family (5+ Units)	221	448	+227
Mobile Homes / Other	415	525	+110
Total	6,238	8,164	+1,926

Source: ACS Table B25024, 2011, 2021

Exhibit 31 compares the estimated change in the number of households in each income group and the number of housing units in each affordability group. The change in households could be new households in the jurisdiction or households switching between income groups due to an increase or decrease in income relative to countywide patterns. Changes in rental units could indicate a loss of housing units, new housing units, or the relative affordability of the housing unit over time. In Bonney Lake, access to affordable units improved for all income levels between 2014 and 2020.

Exhibit 31: Change in Renter Households by Income and Rental Units by Affordability, Bonney Lake, 2014 – 2020

Source: HUD CHAS Tables 14B and 15C, 2010-2014 and 2016-2020

Mobile, Manufactured, and Recreational Vehicle (RV) Parks

Mobile, manufactured, and recreational vehicle (RV) parks contain housing units that are often more affordable than similarly located and sized site-built housing. These units offer some of the benefits of homeownership with lower cost points; however, are disproportionately occupied by older adults compared to other housing types and may have fixed incomes. The primary benefit to the homeowner is that by owning the housing unit, the monthly costs are less expensive than similarly sized homes elsewhere. Many residents value the configuration of smaller, detached units, private exterior spaces, parking close to their home, and lack of through traffic.

Once mobile or manufactured units are sited, they are largely immobile, and owners often lack the ability to safely move their home to another park. Moving a unit is costly and could potentially damage the unit. Since market rate housing are often out of the price range for many unit owners, they are functionally captive and vulnerable to increased fees and displacement if the park is closed or converted to other uses. Residents are frequently displaced out of the community when parks close, particularly if the park is small, owned by an individual, and/or is in a non-residential zone.

Park owners are required to register the park with the Washington State Department of Commerce (Commerce). State law also requires that park owners provide twelve months' notice to Commerce when they plan to close the park. Commerce can then provide support to impacted tenants through existing programs.

No parks in Bonney Lake have been closed since at least 2009¹⁶, and while all three parks are zoned commercial, the City is unaware of any redevelopment plans as of this report.

Exhibit 32: Manufactured / Mobile Home Communities, Bonney Lake, 2024

Park Name	Zoning	Ownership	Last Sold	Spaces
Firview Manor	Commercial	LLC (WA)	2005	26
Quiet Meadow	Commercial	LLC (WA)	1981	62
Woodside Manor	Commercial	INC (CA)	2018	96
Total				184

Source: Pierce County Assessor Data; Commerce Registered Manufactured / Mobile Home Communities in Washington.

¹⁶ Commerce Community Closure List: <https://app.box.com/s/d07sr6a93xi8eirq5y0gmksw8oahxk0h>

Affordable Housing Covenants

Bonney Lake currently has two properties with affordable housing covenants (see **Exhibit 33**). Affordable housing covenants in multi-family housing units limit the rental prices of a certain number of units to local AMI levels. Depending on the subsidy mechanism, owners of affordable housing can convert their properties to market rate rentals when those covenants expire. Expiring affordable housing covenants can lead to the displacement of households who are no longer able to afford their rent.

Exhibit 33: Active Affordable Housing Covenants, Bonney Lake, 2024

Property Name	Funding Type	HUD ID	Expiration	Assisted Units	Total Units
Cedar Ridge Retirement	WA 80/20 Bonds	WA-04-93A	08/31/2028	25	123
The View by Vintage	LIHTC 4% Tax Credit	WAA2020024	01/01/2050	408	408

Source: National Housing Preservation Database, <https://nhpd.preservationdatabase.org/Data>
LIHTC: Low Income Housing Tax Credit

Deterioration of Housing Quality

As housing ages, units that have not been well maintained or remodeled over time or which lack complete plumbing or kitchen facilities may indicate a need for housing assistance or rehabilitation loans to prevent displacement.

In Bonney Lake, almost 50% of the available housing has been constructed since 2000, and approximately 96% of the available housing is less than 50 years old (see **Exhibit 34**). Overall, the housing stock is very new, however several units have indicators that may be related to a substandard unit. In 2021:

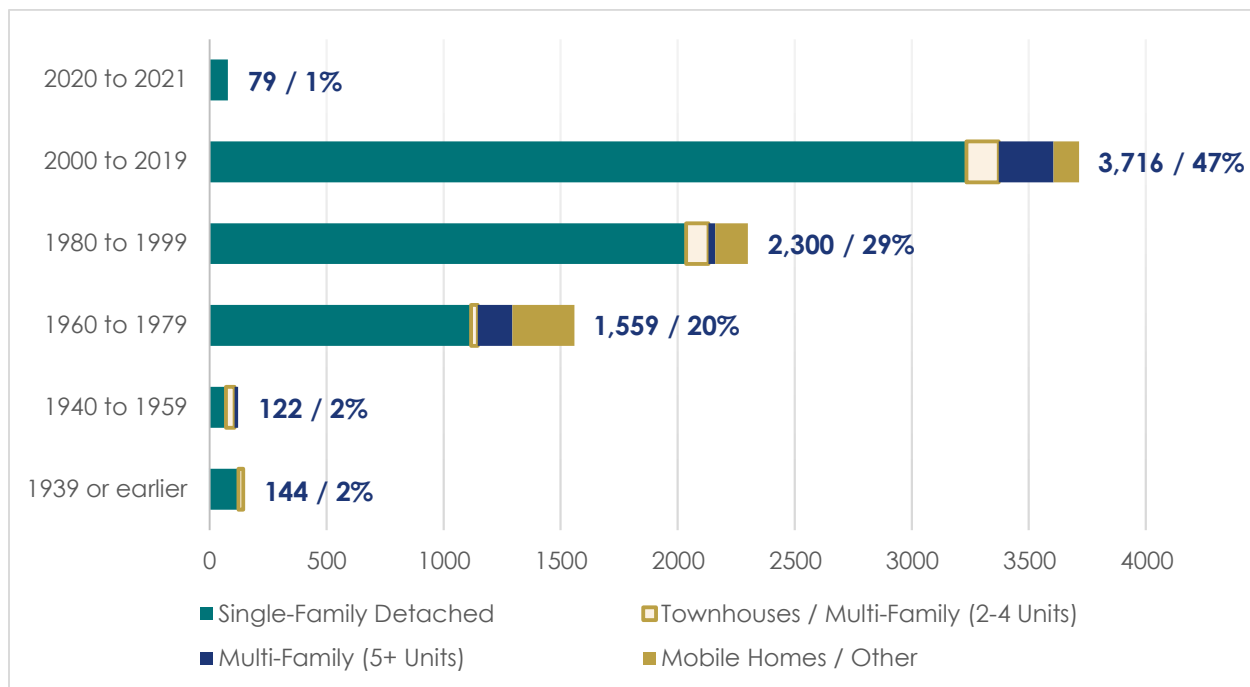
- 74 housing units (1%) did not have complete kitchen facilities, defined as having a sink with a faucet, a stove or range, and/or a refrigerator. These units all included meals in the rent and are likely located within care facilities¹⁷.
- 70 housing units (1%) did not have complete plumbing facilities, defined as having hot and cold running water, a flush toilet, and/or a bathtub or shower. These may indicate substandard units or units within a care facility¹⁸.

¹⁷ ACS Table B25054, 2021

¹⁸ ACS Table B25050, 2021

- 11 housing units (0.1%) indicated “no fuel used”, meaning the homes do not use any fuel or do not have heating equipment. These may indicate substandard units or vacant units where utilities are shut off¹⁹.

Exhibit 34: Housing Units by Type and Year Built, Bonney Lake, 2021



Source: ACS Table B25127, 2021

¹⁹ ACS Table B25040, 2021

4. EXISTING POLICY EVALUATION

This section applies a framework based on the Commerce Guidance to assess whether existing housing goals and policies in Bonney Lake's adopted 2015 Comprehensive Plan and existing development regulations may have contributed to racially disparate impacts, displacement, or exclusion in housing.

4.1 METHODOLOGY

The adopted 2015 Comprehensive Plan was screened using the following questions:

1. Does the goal or policy support access to housing and construction and/or rehabilitation of housing to meet identified housing needs?
2. Does the goal or policy have the potential to disproportionately impact, displace, or exclude a group of people, either intentionally or unintentionally? If so, can this be mitigated through policies or actions?
3. Does the goal or policy support outcomes that are distributed equitably throughout the City?
4. Does the goal or policy contain words that may be interpreted as exclusionary? This may include use of vague terminology such as "character", "family housing" or "appropriate" when referring to housing and household types.
5. Does the goal or policy prioritize certain types of households and housing types over others, by using words or phrases such as "citizen" instead of "resident" or "single-family" instead of "single unit" or "low-density" housing?

Using the outcome categories below, the current goals and policies were evaluated to identify which could have contributed adversely to inequity and inequality in home ownership, availability, and affordability.

- **S / Supporting** = The policy is valid and supports meeting the identified housing needs. The policy is needed and addresses or does not contribute to identified racially disparate impacts, exclusion or displacement in housing.
- **N / Neutral or Approaching** = The policy can support meeting the identified housing needs but may be insufficient or does not address racially disparate impacts, exclusion or displacement in housing.
- **C / Challenging** = The goal or policy challenges Bonney Lake's ability to meet the identified housing needs and may be contributing to racially disparate impacts, exclusion or displacement.

4.2 POLICY EVALUATION

2015 Goal / Policy: Goal CD-2	
Current Language:	Develop dynamic and vibrant centers accommodating housing, shopping, services, civic activities, entertainment facilities, and recreational opportunities in a manner that harmoniously blends the natural and built environments.
Finding:	Neutral
Why:	Could be strengthened by expanding the language to accommodate a variety of housing forms.
2015 Goal / Policy: Policy CD-2.2	
Current Language:	Policy CD-2.2: Encourage the development of mixed-use, senior housing, high density residential, and public services uses such as education, health care, libraries, childcare, governmental facilities in the centers to create vibrant activity nodes, provide housing choices, advance sustainable development principles, support transit, and preserve the City's existing residential neighborhoods.
Finding:	Challenging
Why:	Preservation or rehabilitation of existing housing stock should be a separate policy. Strengthen the policy by promoting a wider variety of middle- and high-density housing forms.
2015 Goal / Policy: Policy CD-4.1	
Current Language:	Planning and land use decisions should recognize residential neighborhoods as the basic "building blocks" of the community, ensure compatibility with existing detached homes, protect neighborhoods from incompatible uses, and maintain a range of residential zones corresponding to the prevailing neighborhood densities.
Finding:	Challenging
Why:	Consider rephrasing to: "Planning and land use decisions should recognize residents as the foundation of the community, by promoting compatibility between existing and new housing units, protecting residential uses from adverse impacts and uses, and maintaining a range of residential zones to support the identified housing needs."

2015 Goal / Policy:	Policy CD-4.2
Current Language:	Allow home occupations in Bonney Lake's residences, if impacts are mitigated and the business does not alter the residential character of the neighborhood.
Finding:	Neutral
Why:	Home occupations can be an important part of the economic and cultural fabric of the community and can improve the affordability and/or accessibility of housing. Strengthen this policy by focusing on "when all applicable regulations can be satisfied" rather than assuming negative impacts.
2015 Goal / Policy:	Policy CD-4.3
Current Language:	Allow schools, day care centers, senior centers, group homes, public and semi-public facilities (e.g. churches), and nursing care facilities in residential areas, subject to conditions which limit the impacts of these uses on nearby properties. To the extent permitted by state and federal law, conditions of approval may be placed on such uses to ensure that they are operated in a manner that is sensitive to neighborhood concerns, and that maintains residents' quality of life. In addition, such uses should be sited in a way that minimizes the exposure of future occupants to noise, localized air pollutions sources, and other environmental hazards.
Finding:	Neutral
Why:	Delete this policy – these issues are addressed via permitting procedures and development standards.
2015 Goal / Policy:	Policy CD-4.3²⁰
Current Language:	Provide healthy and safe neighborhoods free of nuisances, environmental hazards, and visual blight (e.g. excessive noise, poor air quality, light pollution, illegal dumping, illegal signage, graffiti, littering, etc.) that disrupt and impact Bonney Lake residents' quality of life.
Finding:	Neutral
Why:	Nuisances are often coupled with a lack of financial or physical ability to address an issue, and can disproportionately impact low-income, elderly, or disabled populations. Consider updating to: "Support healthy and safe neighborhoods by developing and implementing programs to address nuisances and environmental hazards (e.g. excessive noise, poor air quality, light pollution, illegal dumping, illegal signage, graffiti, littering, etc.)."

²⁰ Policy number duplicated in adopted Comprehensive Plan.

2015 Goal / Policy:	Policy CD-9.2
Current Language:	Use development regulations to direct growth, ensure sufficient opportunities for new development, improve Bonney Lake's quality of life, preserve existing neighborhoods, reduce nuisances, achieve compatibility between adjacent properties and uses, address land use conflicts, and protect the health and safety of residents, visitors, and workers.
Finding:	Neutral
Why:	Consider clarifying this policy by rephrasing to: "Adopt and routinely update development regulations to direct growth, ensure sufficient opportunities for new development, maintain and improve Bonney Lake's quality of life, preserve and rehabilitate existing housing stock, mitigate nuisances, achieve compatibility between adjacent properties and uses, and protect the health, safety and welfare of residents, workers, and visitors."
2015 Goal / Policy:	Policy CD-9.11
Current Language:	Redevelop Bonney Lake's underdeveloped or vacant sites in a manner that balances providing an array of housing, jobs, retail, recreational, and entertainment opportunities, with the need to respect the scale and form of surrounding properties and neighborhoods.
Finding:	Challenging
Why:	Policies with the potential to displace existing households should be paired with policies to support these households with relocation or opportunities to participate in the new development. This policy should be updated to respect the <u>planned</u> scale and form of surrounding properties; as written it prioritizes individual existing development over the needs of the community overall
2015 Goal / Policy:	Goal CD-10
Current Language:	Provide a variety of housing options that will meet the needs of all Bonney Lake's residents and are affordable to all economic segments of Bonney Lake.
Finding:	Supporting
Why:	Could be strengthened to include the identified housing needs of current and future residents.

2015 Goal / Policy:	Policy CD-10.1
Current Language:	Encourage the development of a diverse and high quality housing stock that provides a range of housing types (including family and larger-sized units) to accommodate the diverse needs of Bonney Lake's residents through changes in age, family size, and various life changes.
Finding:	Neutral
Why:	Focuses on families instead of households; could be updated to support a variety of life changes such as age, household size, income, and mobility; and does not also encourage preservation and rehabilitation of existing housing stock.
2015 Goal / Policy:	Policy CD-10.2
Current Language:	Encourage the development of special-needs housing, especially for seniors, such as independent living facilities, various degrees of assisted living facilities, and skilled nursing care facilities.
Finding:	Neutral
Why:	Bonney Lake has a higher proportion of individuals under the age of 65 with disabilities; the policy currently emphasizes seniors with disabilities over other special-needs populations.
2015 Goal / Policy:	Policy CD-10.3
Current Language:	Actively promote community awareness and education campaigns regarding affordable housing in order to engender acceptance throughout the community.
Finding:	Challenging
Why:	This policy inadvertently reinforces stigma around the term "affordable housing", instead of more accurately referring to housing affordable to the residents who live here. This policy can be strengthened by promoting community awareness of homeownership programs, tenant protections, rehabilitation / preservation programs, and rental assistance available in Pierce County.
2015 Goal / Policy:	Policy CD-10.4
Current Language:	Explore methods and partnerships to reduce the costs associated with developing housing.
Finding:	Supporting
Why:	This policy could be clarified to indicate whether this is supported throughout the City or just in specific zoning districts or for specific housing types.

2015 Goal / Policy:	Policy CD-10.5
Current Language:	Ensure that there is a sufficient supply of housing affordable to all income levels by maintaining a supply of housing that is currently affordable to median-income, low income and very low-income households, and work to increase the supply of housing affordable to households within Bonney Lake that make eighty percent (80%) of the Pierce County Median Income by 702 housing units ²¹ .
Assessment:	Supporting
Why:	This policy could be clarified to indicate whether this is supported throughout the City.
2015 Goal / Policy:	Policy CD-10.6
Current Language:	Actively participate in regional responses to housing needs and issues.
Assessment:	Supporting
Why:	This policy lacks specificity. Consider updating the policy to: "Work with Pierce County and other local governments to investigate and implement regional funding options to support the development and/or maintenance of affordable housing such as a regional housing trust fund, regional housing tax levy, real estate excise tax or other mechanisms."
2015 Goal / Policy:	Policy CD-10.7
Current Language:	Allow the use of recreational vehicles (RVs) as a primary residence within mobile home parks when all applicable regulations can be satisfied.
Assessment:	Neutral
Why:	While RVs can be an excellent temporary housing option, they depreciate in value quickly and can be difficult to repair, sell, and insure. Consider pairing this policy with support for transitioning into alternative, permanent housing options, if desired by the occupant.
2015 Goal / Policy:	Policy CD-10.8
Current Language:	Allow manufactured homes in all residential zones that allow single-family residences.
Assessment:	Supporting
Why:	This policy assumes the type of household occupying the unit. Consider updating the policy to reference single-unit dwellings instead of single-family residences.

²¹ Pierce County's Countywide Planning Policy (CPP) AH-3.3 provides that it should be the goal of every City that a minimum of twenty-five percent of the growth allocated to a jurisdiction is satisfied through affordable housing. CPP-AH-3.1.1 defines "affordable housing" as households making less than eighty percent of the countywide median income. Twenty-five percent of the growth allocated to the City of Bonney Lake by Pierce County pursuant to Ordinance No. 2011-36s as amended by Ordinance No. 2017-24s is 702 housing units.

2015 Goal / Policy: Policy CD-10.9	
Current Language:	Regulate residential structures occupied by persons with handicaps no differently than similar residential structures occupied by a family or unrelated individuals.
Assessment:	Challenging
Why:	Disabilities can be physical or cognitive, and disabled customers may need additional reasonable accommodation to ensure an equitable permitting process. Consider clarifying the policy to ensure there are no functional barriers to permitting associated with housing units occupied by disabled persons.
2015 Goal / Policy: Appendix C, Centers Plan, Policy CP-1.1	
Current Language:	Adopt land use and zoning that supports housing and employment growth within the centers.
Assessment:	Neutral
Why:	This language could be clarified to clearly support a variety of housing forms to meet the identified housing need allocated to the Centers.

5. RECOMMENDED STRATEGIES

Based on the **Impact Assessment** and **Existing Policy Evaluation**, this section summarizes recommended strategies to address the identified racially disparate impacts, displacement and exclusion in housing. To meet the housing needs of all community members, Bonney Lake will need to use a range of policies, incentives, strategies, actions and regulations.

1. Revise existing policy language to clarify the policy intent.

Using language that accurately describes the policy intent helps ensure that policy implementation is aligned with its intent. Subjective terms create confusion for interpretation and implementation and can introduce uncertainty that creates barriers to development. Historically, subjective and normative terms such as “character” have been used across the United States to prevent housing development associated with people of color and may contribute to segregation and exclusion.

In Washington, the comprehensive plan of every city and county must be internally consistent (RCW 36.70A.070) and aligned to the goals of the GMA, including encouraging the availability of affordable housing for all economic segments of the population, promoting a variety of residential densities and housing types, and encouraging the preservation of the existing housing stock. Recommended strategies include:

1-A. Define subjective terms such as “character”, “quality” and “appropriate” in the housing policies or use alternative language that is specific and accurate to the policy intent. **Remove outdated language such as “blight”**, which is associated with historic harm to communities of color. Alternative terminology could include “structures in disrepair” or “structures with deferred maintenance.”

1-B. Avoid the use of “single-family”. Descriptive terms such as “detached housing units”, “low-density housing” or “house-scale development” more accurately describe the intended land use and scale of development and avoid stigmatizing housing types that are not single-family.

1-C. Revise policy language to specify buffering incompatible land uses for the health and safety of all residents. Requiring buffers between different residential uses contributes to stigma around people who live in multi-family and middle housing and increases development costs.

1-D. Revise language about “harmonious blending”. Consider emphasizing the importance of site design in terms of walkability and access to open space, instead of in terms of visual impacts alone.

1-E. Balance preservation, rehabilitation, and infill policies to meet identified housing needs. Preservation of existing units prefers single-family types by default. Preservation policies are still important but could be balanced by adding language that also supports higher-density development, which helps meet all economic needs in the community and address racially disparate impacts.

1-F. Ensure that policies do not reinforce stigmas around affordable housing and instead emphasize that “affordable housing” refers to any housing that is affordable to the household that is occupying it.

1-G. Clarify language about **planning for all income bands** to the Housing sub-element to reflect new GMA requirements.

2. Add policies to address racial disparities in homeownership.

The Racial Equity Analysis identifies a disparate impact in homeownership amongst the Hispanic and Latino community. VISION 2050²² Policy AH-7 calls for jurisdictions to support and encourage homeownership opportunities for low-income and middle-income families and individuals while recognizing historical inequities in access to homeownership opportunities for communities of color. Recommended strategies include:

2-A. Conduct additional community engagement with communities of color, particularly the American Indian and Alaska Native, Other, and Hispanic communities to reveal specific barriers to homeownership experienced by these groups. Policy and strategy updates should prioritize the needs and solutions expressed by this disproportionately impacted community for implementation.

2-B. Inform the community about down payment and assistance programs, which offer no-interest or low-interest capital for qualified buyers. These programs typically pair with homeownership education courses to encourage financial preparedness for participants. To address disparities in homeownership in the Hispanic community, promote these programs in Spanish, partner with providers to bring more classes to Bonney Lake, and support programs by providing meeting rooms and outreach.

2-C. Dedicate surplus or underutilized land for affordable housing production.

²² Available online at: <https://www.psrc.org/planning-2050/vision-2050>

2-D. Consider a **density bonus ordinance** to allow for increased density when income-qualified housing units are provided.

2-E. Review **tree retention requirements** for clarity and potential flexibility. Tree retention codes can be particularly costly to housing development.

2-F. Review impact fees for potential flexibility and/or waive fees for development of low-income and very low-income housing units.

2-G. Review height limits in each zone for potential flexibility. Height limits are a common barrier to developing some low- and moderate-density housing types.

3. Add policies to reinforce existing practice codified in the Bonney Lake Municipal Code, guide the expansion of municipal services in the urban area and ensure the benefits of infrastructure improvements are equitably distributed.

3-A. Unintended displacement impacts could occur when sanitary sewer conversion costs are passed on to property owners. Displacement impacts could be minimized through **flexibility in fees for low-income homeowners or affordable units**.

3-B. Develop and update the Capital Improvement Plan with a goal of providing **equitable access to municipal services** such as roads, pedestrian and bicycle facilities, park facilities, street trees, and utilities.

4. Add policies and regulations to address displacement risk.

4-A. Require tenant relocation assistance. The City could pass an ordinance that requires developers to provide relocation funds for households displaced by new development. This could be limited to tenants earning below a certain income level.

4-B. Require mobile home park relocation assistance. The City could require an evaluation and mitigation of displacement impacts, including relocation assistance, for any proposals to redevelop a mobile, manufactured, or recreational vehicle park.

4-C. Pass a notice of intent to sell ordinance. The City could require owners of multi-family buildings or mobile, manufactured, or recreational vehicle parks to notify tenants and the City in advance of a sale. The ordinance could be written to apply to buildings with rents below certain income levels.

4-D. Support the acquisition of housing developments by private, non-profit, and public low-income housing groups, by acting as a facilitator between the groups and property owners to aid in the preservation of low- and very low-income housing.

4-E. Connect residents to local and state need-based rehabilitation assistance programs. This assistance helps qualifying households (such as senior residents and those with disabilities or low incomes) get favorable financing terms or tax abatements for home repairs and upgrades.

4-F. Encourage expansion of programs that result in home repair, weatherization, and other energy-efficient improvements to owner-occupied and rental housing and promote additional funding for these programs at the state and federal level.

4-G. Provide information on Pierce County's property tax assistance program. Residents who own their homes may struggle to afford property tax increases. Pierce County provides some exemptions for senior citizens and people with disabilities. The City could send mailers and/or provide information on the City website to connect residents to County resources.

Land Capacity Analysis Memo

To: Jason Sullivan – Interim Public Services Director, City of Bonney Lake

From: Dane Jepsen, Associate Planner, LDC Inc.

CC: Kim Mahoney, Principal Planner, LDC Inc.

Date: March 29, 2024

Re: City of Bonney Lake 2024 Land Capacity Analysis

Executive Summary

This Land Capacity Analysis (LCA) assesses an inventory of the vacant and underutilized land within a city's jurisdiction and determines whether the city can accommodate its projected growth targets. This assessment allows the city to gain a better understanding of how much land is available for development, how the city can utilize the available land to meet the projected growth targets, and highlights potential changes needed to achieve the land capacity necessary to accommodate all housing and employment needs projected for the city.

This LCA found the City of Bonney Lake (City) has ample capacity to meet its employment and Emergency Housing growth targets and has an excess of housing capacity for Low-to-High income households but has a housing capacity deficit for those within very low and extremely low-income households. This housing capacity deficit is due to the lack of low-income-serving housing solutions and would require the City to plan to provide an additional 423 residential units by 2044. Given the shortfall in housing capacity, the City has evaluated growth alternatives to accommodate its housing target; these are outlined in the Growth Alternatives memorandum and support the City's commitment to meeting its adopted growth targets.

This memorandum further details the background, methodology, and findings that inform an update to the City's capacity for housing and employment previously established by the Pierce County Buildable Lands Report (BLR).

Background

The City is required to estimate its land capacity to support anticipated growth over the planning period in the land use element¹ of its comprehensive plan (WAC 365-196-405).

In cities within Pierce County, the LCA relies on findings from the BLR. The BLR is an assessment completed by Pierce County that helps determine the amount of land suitable for development within the County, evaluates each city's capacity for growth, and projects the future housing and employment capacity for each city. The BLR bases its findings on recent development activity data provided by the cities within Pierce County. This report is known as the Buildable Lands program (RCW 36.70A.217) and was last updated in 2021². These data form the basis for updating the analysis of land capacity.

¹ The City has chosen to combine the required land use element and housing element into one element due to the significant interrelatedness of these elements, and the significant role these elements play in the lives of Bonney Lake residents.

² The 2021 Buildable Lands Report is based on an inventory of permits and property status as of January 2020 (Pierce County Buildable Lands Report – Fourth Edition, Revised Version pg. 17).

Land Capacity Analysis Overview

Washington Department of Commerce (Commerce) has developed guidance on conducting LCAs; see [Evaluating Land Capacity to Meet All Housing Needs](#), which is specific to housing capacity related to House Bill (HB) 1220, and [Urban Growth Area Guidebook](#), which addresses both housing and employment capacity in relation to the Growth Management Act (GMA).

In partnership with LDC, the City has analyzed development capacity for the 2020-2044/49 planning periods according to Commerce guidance. In this summary, findings from the LCA are reported according to Commerce guidance with underlying analysis performed based on the Pierce County BLR methodology.

Land Capacity Analysis Methodology

The 2021 Peirce County BLR methodology can be broken into two stages: Stage One - Buildable Lands Inventory and Stage Two - Buildable Lands Capacity Analysis. The lists below outline the general stages of this methodology³:

Stage One - Buildable Lands Inventory:

- Pre-Processing
- Step One – Land Use Look-Up
- Step Two – Inclusions and Exclusions
- Step Three – Feasibility
- Step Four – Overrides

Stage Two - Buildable Lands Capacity Analysis:

- Housing Capacity
- Employment Capacity

The two stages and their associated steps were incorporated into this LCA as indicated below:

Stage One - Buildable Lands Inventory

Stage One of the Pierce County Buildable Land Analysis was performed through a county-wide parcel dataset being processed through a scripted model in a Geographic Information System (GIS) setting; this would have been necessary due to the scope of the County's analysis. This LCA also worked from a continuous parcel dataset including all parcels in the City's jurisdiction; considering the decreased scale of this analysis, the analysis was performed in an Excel workbook rather than a GIS. A series of formulas and lookup tables used the following data inputs to compile a Buildable Lands Inventory for the City:

- Parcel data (Pierce County Assessor, May 2023)
- Property Improvement Data (Pierce County Assessor, May 2023)
- Use Code Table (Pierce County 2021 Buildable Lands Report p. 353-358)
- Parcel Critical area coverage (Pierce County 2021 Buildable Lands Inventory⁴ "ENV_ACRES")
- Traffic Analysis Zone Map (Pierce Transit, 2023)
- Zoning and future land use maps (City of Bonney Lake)
- Recent permitted development (01/2020-04/2023) and pipeline projects (City of Bonney Lake)
- Zone Assumptions (Appendix ACity of Bonney Lake)

³ Documentation of the 2021 BLR methodology is fragmented and only addresses the Buildable Lands Inventory process. This description of the methodology is based on LDC's interpretation of the data produced by each analysis.

⁴ <https://piercecowa.maps.arcgis.com/home/item.html?id=361d44275b464dceba4758c0c9635ae0>

Pre-Processing

Prior to beginning the analysis, the continuous parcel dataset including all parcels in the City's jurisdiction needed to be assembled and all base data required for the analysis needed to be joined to it. This process was performed in a GIS using spatial and attribute-based data joins. This process was executed over several review cycles which continuously compared the inventories results to the 2021 Buildable Lands Inventory; the final dataset was compiled using the following sub-steps:

1. Filter parcels to only "Base Parcel" tax parcel type.
2. Join recent permitted development and pipeline projects to base parcels.
3. Spatially join critical area encumbrances from 2021 Buildable Lands Inventory to base parcels.
4. Spatially join current zoning and future land use map designations to base parcels.
5. Join Property Improvement Data current city parcels, then spatially to base parcels.

After these sub-steps were performed, the base dataset for the Buildable Lands Inventory was compiled and exported into an Excel workbook for further analysis. Every parcel in the base dataset was processed through the following steps resulting in the parcels classification of one of the following Buildable Lands Inventory designations:

Buildable Lands Inventory designation	Description
Vacant	Land that is vacant of any improvements or existing use. Can be identified by Pierce County Assessor use code or by improvement value.
Vacant Single Unit	Vacant land that is too small to develop more than one Single-Family Residential unit on. This designation is specific to residential zones.
Underutilized	Land that is not vacant and is identified to have potential for redevelopment. This is identified based on existing development compared to the redevelopment potential.
Pipeline	Land that is associated with an existing land use/civil project being permitted by the City of Bonney Lake that has not yet received approval as of April 2023.
Built Out/Undevelopable	Vacant or developed land that is identified to not likely have any development or redevelopment potential. Some reasons include presence of critical areas, public property, improvement value too high, or not enough space to redevelop.

Table 1 – Buildable Lands Inventory Designations

Step One – Land Use Look-Up⁵

All parcels in the base dataset have their designated Pierce County Assessor Use Code compared against the Use Code Table which defines the development potential of properties based on their use. Possible designations from this table are as follows:

- Unbuildable
- Redevelopable
- Vacant
- Aircraft Land
- Gov Land
- School Land
- Golf Course

⁵ The Pierce County Buildable Lands Methodology refers to this as "Stage 1A".

Parcels designated "Vacant" or "Redevelopable" are again evaluated in Step Two - Inclusions and Exclusions.

Step Two – Inclusions and Exclusions⁶

Based on other base data, parcels designated "Vacant" or "Redevelopable" in Step One are evaluated to either be included or excluded from future analysis.

Possible designations from this step are as follows:

- Exclude
- Vacant
- Pipeline
- Redevelopable

Some parcels will be excluded in this step if they fit any of the following criteria:

- Use type designations in the Use Code Table of "GOV" or "EDUC".
- Use type designation in the Use Code Table of "RES SFR" with a Pierce County Assessor property improvement value over \$500,000.
- Use type designation in the Use Code Table other than "RES SFR" with a Pierce County Assessor property improvement value over \$1,500,000.
- Any recent⁷ permitted development was reported for the parcel.

Some parcels will be included in this step if they fit any of the following criteria:

- Use type designation in the Use Code Table other than "RES SFR" with a Bonney Lake zone type of "MIX COM" or "COM".
- Any pipeline projects were reported for the parcel.

Any parcels that were not explicitly included or excluded by one of the above conditions are advanced to Step Three with the parcel designation they received in Step One.

Step Three – Feasibility

In Step Three, parcels designated "Vacant" or "Redevelopable" had the feasibility of potential development capacity evaluated based on the Bonney Lake Zone Assumptions 9Appendix A), presence of critical areas, and existing residential units or commercial space. This step concludes with a Preliminary Capacity Designation aligning with the final output of the Buildable Lands Inventory (Vacant, Vacant Single Unit, Underutilized, Pipeline, Built Out/Undevelopable).

Net parcel area is determined by subtracting the parcel critical area coverage from the Pierce County Assessors listed parcel size. In some cases, the parcels that had been evaluated for critical areas in the 2021 Buildable Lands Inventory have since had their parcel area updated in the assessor's data or parcels had a listed acreage of 0, resulting in negative values for net parcel area; because of this, net parcel area is limited to 0.

Vacant Parcels

Only residential Step Two - "Vacant" parcels were evaluated for subdivision feasibility; if the net parcel area was smaller than the minimum lot size for that parcel's zone, the parcel was designated as "Vacant Single Unit"; otherwise, the parcel was designated "Vacant". All Step Two - "Vacant" parcels in mixed use or commercial zones were designated as "Vacant".

Redevelopable Parcels

All "Redevelopable" parcels were evaluated for redevelopment potential by comparing the build potential (based on zone assumptions and net parcel area) to the existing development. All parcels are evaluated

⁶ The Pierce County Buildable Lands Inventory table shows this as "Stage 1B"

⁷ Building activity that was permitted in the City between January of 2020 and April of 2023

for both residential and commercial development build potential using the zone assumptions for residential density, mixed-use split, and minimum lot size and commercial density and mixed-use split; see zone assumptions (Appendix A). Parcel redevelopment was deemed feasible for residential or commercial development if the net development to existing development ratio exceeded the following feasibility threshold:

Development	Feasibility Threshold
Residential	>2.5 (Net units/existing units)
Commercial	>5 (Net jobs/existing jobs) ⁸

Table 2 – Stage One, Step Three, Redevelopable Feasibility Thresholds

After residential and commercial feasibility was evaluated, a Preliminary Capacity Designation was assigned based on the parcels zoning. Parcels in residential and commercial zones that were deemed feasible for redevelopment were designated "Redevelopable" and those that were deemed infeasible were designated "Built Out/Undevelopable". Parcels in mixed-use zones needed to meet two conditions to be designated "Redevelopable":

1. Have either commercial or residential redevelopment feasibility, and
2. Neither commercial nor residential have a negative net development to existing development ratio.

This ensures that parcels in mixed-use zones, with substantial residential or commercial development, were not included for redevelopment potential. Parcels were designated "Built Out/Undevelopable" if either of these conditions were not met.

Pipeline Parcels

All parcels with the Step two designation of "Pipeline" received a Preliminary Capacity Designation of "Pipeline".

Excluded Parcels

All parcels with the Step two designation of "Exclude" received a Preliminary Capacity Designation of "Built Out/Undevelopable".

Step Four – Overrides

Following Preliminary Capacity Designation, parcels were exhaustively reviewed by LDC and City staff to identify unique circumstances such as parcels with inaccurate assessor's use designations, parcels owned by the City, and parcels that served some other incompatible use, such as access tracts or stormwater infrastructure. This review closely considered previous designations from the 2021 Buildable Lands Inventory. Any exceptions or discrepancies identified in this review were corrected by directly overriding the assigned designation with one determined to be accurate by LDC and City staff, resulting in a Final Capacity Designation.

Stage Two - Buildable Lands Capacity Analysis

Stage Two of the 2021 Pierce County Buildable Land Analysis was performed within an Excel workbook through a progressive calculation table applying zone assumptions and summarizing development capacity by each zone of each jurisdiction. This LCA worked from a progressive calculation table of the same structure, but summarized capacity by zone and by Traffic Analysis Zone (TAZ) for a total of 484 rows of zone/TAZ combinations of summarized capacity.

⁸ Existing jobs were estimated based on Property Improvement Data commercial building square-footage and Use type designations in the Use Code Table. Commercial Properties (Use Type "FIRES" or "RETAIL") had an assumed 500 square-feet per employee, Manufacturing Properties (Use Type "MANU" or "WTCU") had an assumed 900 square-feet per employee.

While Stage One involved the estimation of development capacity for the purposes of determining site feasibility, none of the counts of residential or commercial capacity are directly included in this stage of analysis other than those counts from recent development, Pipeline projects, and Vacant Single Unit parcels; all remaining capacity is calculated strictly based on the base dataset and Final Capacity Designation from Stage One.

The progressive calculation table summarized components of residential and commercial capacity in steps; the added the steps together yield a final residential and commercial capacity for each zone/TAZ combination. This Final Capacity (employment and housing) becomes the input for Step 1 of the Commerce LCA guidance (discussed on page 12 of this memorandum).

Housing Capacity

Housing capacity was calculated for each zone/TAZ combination. The diagram below shows the basic progressive steps that are incorporated in the calculation of Final Housing Capacity. Details of each step are provided beneath the diagram.

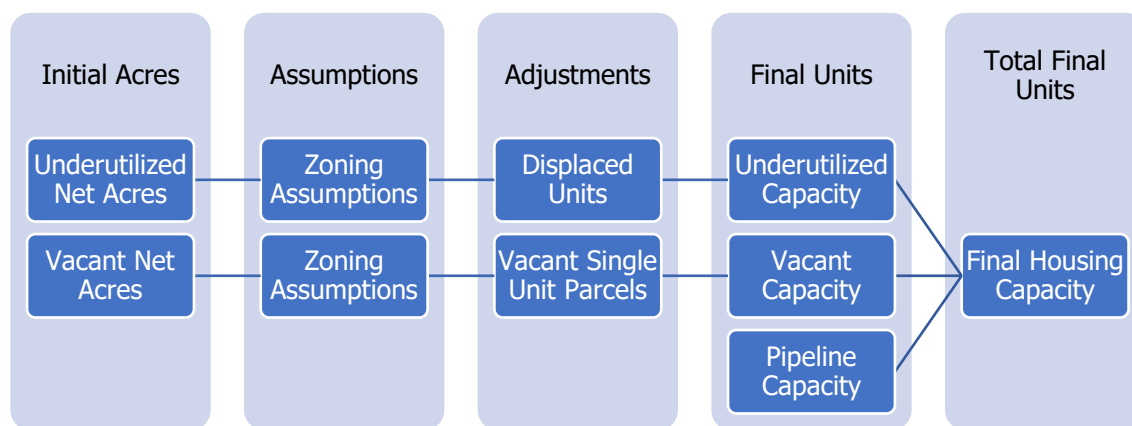


Figure 1 – Stage Two, Housing Capacity Calculation

Initial Acres

Housing capacity's initial acres are net acres (total acres minus any critical areas). Only the acres of parcels with a Stage One Final Capacity Designation of "Vacant" or "Underutilized" are totaled in initial acres.

Assumptions

Housing zone assumptions include:

- Density
- Mixed-Use Split
- Market Factor
- Plat Deductions
- Non-residential Use in Residential Zone

Assumptions are unique to each zone. Mixed-Use Split only applies to Mixed-Use zones, the split divides the available land in a zone between housing and employment. Market factor applies a reduction to the total land area available to account for the likelihood of a property being developed given the local real estate market; generally, "Underutilized" land will have a higher market factor than "Vacant" land. Single-family residential zones have a 5% deduction "Non-residential Use in Residential Zone" to plan for the co-location of residences and jobs and future housing; this is deducted from both "Vacant" and "Underutilized" land in applicable residential zones.

Adjustments

Housing adjustments include displaced units and vacant single unit parcels. Any existing dwellings on underutilized land (in all zones) are considered "displaced" in this analysis; actual redevelopment of a

specific site might include the preservation of existing units; regardless, they are subtracted from the total units of underutilized capacity to represent net housing growth. Parcels with a Stage One Final Capacity Designation of "Vacant Single Unit" are counted and added in to vacant housing capacity after zone assumptions are applied; since these parcels will not subdivide, they are not expected to have substantial changes to their future housing dependent on market factor or public dedications.

Final Units

Final units from vacant and underutilized land, as well as those to be provided by pipeline development, are compiled.

Total Final Units

All final units from vacant and underutilized land, as well as those to be provided by pipeline development, are summed to represent total housing capacity for each zone/TAZ combination.

Employment Capacity

Employment capacity was calculated for each zone/TAZ combination. The diagram below shows the basic progressive steps that are incorporated in the calculation of Final Employment Capacity. Details of each step are provided beneath the diagram.

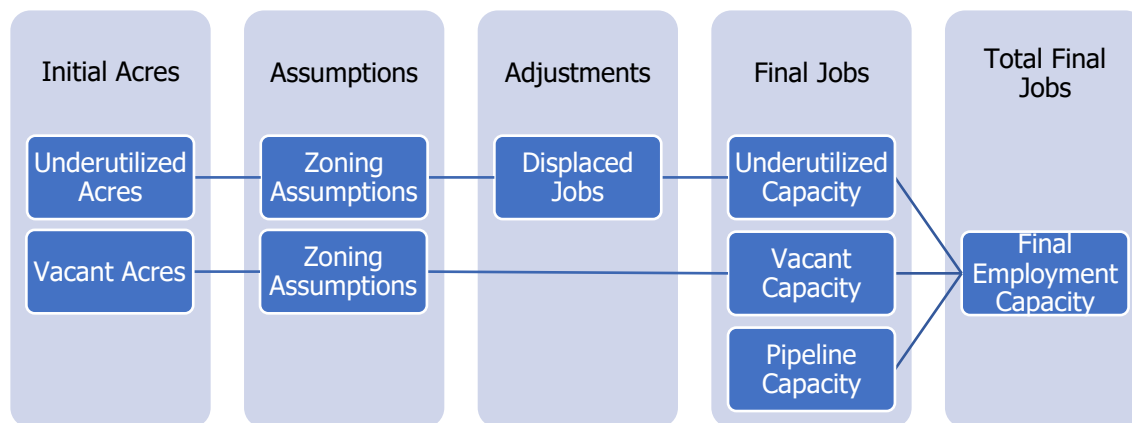


Figure 2 – Stage Two, Employment Capacity Calculation

Initial Acres

Employment capacity's initial acres are gross acres; the 2021 BLR included an employment density survey that recommended a base rate of jobs/acre be applied to gross acreage; this differs from housing initial acres in that critical areas are not considered. Only the acres of parcels with a Stage One Final Capacity Designation of "Vacant" or "Underutilized" are totaled in initial acres.

Assumptions

Employment zone assumptions include:

- Density
- Mixed-Use Split
- Market Factor
- Non-residential Use in Residential Zone

Employment assumptions function very similarly to the housing assumptions, including density, mixed-use split, and market factor assumptions. According to the 2021 BLR methodology, employment density is broadly applied at a rate of 20 employees per acre for commercial/mixed use zones and 9 employees per acre for industrial zones; in Bonney Lake the only industrial zone is the Easttown zone. Non-residential

Use in Residential Zone, calculated in housing capacity, is added to vacant and underutilized employment capacity after acreage deductions are applied but before density is applied.

Adjustments

Employment adjustments include displaced jobs. Displaced jobs work mostly the same as displaced units except they utilize the existing jobs calculation made in Stage One – Step Three of the Buildable Lands Inventory.

Final Jobs

Final jobs from vacant and underutilized land, as well as those to be provided by pipeline development, are compiled.

Total Final Jobs

All final jobs from vacant and underutilized land, as well as those to be provided by pipeline development, are summed to represent total employment capacity for each zone/TAZ combination.

Land Capacity Analysis Results

The LCA produced projections of future capacity for housing and employment. The remainder of this memo will review the LCA's outcomes and options related to the City's 2024 Comprehensive Plan update.

Housing and Employment Targets 2020-2049

On July 7, 2023, the City was assigned housing and employment growth targets for the 2020-2044 planning period (Pierce County Ordinance No. 2023-22s). The planning horizon for the City's periodic update will be extended out to 2049 to coincide with the centennial for the City. The assumed growth rates to achieve the 2044 target for each category were extended at a constant rate to establish an estimated target for the 2049 planning horizon.

Growth Targets	2020-2044	2020-2049
Population Target	Growth: 3,880 Total: 26,367	Growth: 5,042 Total: 27,529
Housing Target	Growth: 1,451 Total: 9,055	Growth: 1,977 Total: 9,582
Employment Target	Growth: 1,717 Total: 8,082	Growth: 2,129 Total: 8,494

Table 3 – Bonney Lake Growth Targets

Current Development

The City provided data for land development that has occurred since the 2021 BLR. The following tables summarize the amount and type of building activity that was permitted in the City between January of 2020 and April of 2023. Any development applications not yet permitted by this date will be incorporated later in the LCA as Pipeline Projects.

2020-2023 Permits	
Development	Quantity
Single-Family Detached	170 Units
ADU	7 Units
Multi-Family	505 Units
Total Residential	682 Residential Units
Commercial Building	395,340 Square-feet
Total Commercial	504 Estimated Jobs

Table 4 – 2020-2023 Permit Summary

Permitted units and jobs can be directly counted against the City's current growth targets because they have effectively increased the City's capacity for housing and employment.

Growth Targets	2020-2044	2020-2049
<i>Housing Target</i>	<i>1,451</i>	<i>1,977</i>
2020-2023 Permitted Growth	682	682
Target Remaining	769	1,295
<i>Employment Target</i>	<i>1,717</i>	<i>2,129</i>
2020-2023 Permitted Growth	504	504
Target Remaining	1,213	1,625

Table 5 – Remaining Growth Targets

Employment Capacity

Employment capacity includes potential jobs from vacant and underutilized land, known pipeline projects, and the loss of jobs from development activities (Residential or Commercial) removing existing commercial space. Note that even residential zones have employment capacity since the zone assumptions for Bonney Lake include a 5% "Non-residential Use in Residential Zone" to plan for the co-location of residences and jobs for future housing.

Employment Capacity (Jobs)				
Zone	Initial	(Displaced)	Pipeline	Total
(C-1) Neighborhood Commercial District	0	(0)	0	0
(C-2) Commercial District	203	(3)	24	224
(DC) Downtown Core District	39	(37)	0	2
(DM) Downtown Mixed Use District	55	(23)	64	96
(E) Eastown District	260	(2)	533	791
(MC) Midtown Core District	429	(7)	63	485
(PF) Public Facilities District	0	(0)	0	0
(R1) Low-Density Residential District	246	(0)	0	246
(R2) Medium-Density Residential District	53	(0)	0	53
(R3) High-Density Residential District	43	(0)	0	43
(RC-5) Residential/Conservation District	36	(0)	0	36
Total	1,364	(72)	684	1,976

Table 6 – Employment Capacity Summary

The City has net employment capacity for approximately 2,365 jobs, considering current zoning provides approximately 1,364 jobs (of which, approximately 72 jobs exist on underutilized properties, resulting in Zoned Employment capacity of 1,292 jobs), and approximately 684 jobs will be provided by pipeline development.

Employment capacity in the City is more than sufficient to satisfy its employment growth targets. The table below shows the employment outcomes of the LCA against the 2044 and 2049 targets showing a surplus of 763 and 351 jobs, respectively.

Employment	2020-2044	2020-2049
2020-2023 Permitted Growth	504	504
Pipeline projects	684	684
Zoned Employment capacity	1,292	1,292
Total Employment Capacity	2,480	2,480
(Employment Target)	(1,717)	(2,129)
Employment Capacity Surplus (or deficit)	763	351

Table 7 – Employment Growth Target Progress

Housing Capacity

Per the GMA, the LCA needs to take into consideration capacity for Affordable Housing, Permanent Supportive Housing, and Emergency Housing, as well as needs for traditional market rate housing⁹. These housing types will be referenced throughout the LCA; their definitions from the GMA are available in the table below:

Housing type	Definition from RCW
Affordable Housing RCW 84.14.010	Residential housing that is rented by a person or household whose monthly housing costs, including utilities other than telephone, do not exceed thirty percent of the household's monthly income. For the purposes of housing intended for owner occupancy, "affordable housing" means residential housing that is within the means of low or moderate-income households.
Permanent Supportive Housing (PSH) RCW 36.70A.030	Subsidized, leased housing with no limit on length of stay that prioritizes people who need comprehensive support services to retain tenancy and utilizes admissions practices designed to use lower barriers to entry than would be typical for other subsidized or unsubsidized rental housing, especially related to rental history, criminal history, and personal behaviors. Permanent supportive housing is paired with on-site or off-site voluntary services designed to support a person living with a complex and disabling behavioral health or physical health condition who was experiencing homelessness or was at imminent risk of homelessness prior to moving into housing to retain their housing and be a successful tenant in a housing arrangement, improve the resident's health status, and connect the resident of the housing with community-based health care, treatment, or employment services.
Emergency Housing RCW 36.70A.030	Temporary indoor accommodations for individuals or families who are homeless or at imminent risk of becoming homeless that is intended to address the basic health, food, clothing, and personal hygiene needs of individuals or families. Emergency housing may or may not require occupants to enter into a lease or an occupancy agreement.

Table 8 – GMA Housing Definitions

The City has adopted targets to add an additional 1,451 residential units and 334 emergency beds by 2044. These targets incorporate needs for Affordable Housing, PSH, and Emergency Housing, as well as needs for traditional market rate housing. As is previously stated, Pierce County Ordinance No. 2023-22s (adopted July 7, 2023) establishes the City's housing growth target allocations; the table below outlines permanent housing targets by income and emergency housing target in beds.

Permanent Housing Target (Units) by Affordability (AMI)								Emergency Housing Target (Beds)
0 – 30%		30 – 50%	50 – 80%	80 – 100%	100 – 120%	120% Plus	Total	
Non-PSH	PSH							
187	253	269	213	92	83	354	1,451	334

Table 9 – Affordable and Emergency Housing Targets

In 2021, the GMA was amended to reflect the passing of HB 1220, requiring local government to plan for and accommodate affordable housing to all economic segments. The GMA was later amended in 2023 to reflect the passing of HB 1337, requiring eased barriers to the construction and use of ADUs.

⁹ RCW 36.70A.070(2)(c)

To demonstrate compliance with HB 1220, housing capacity is reported according to Commerce guidance¹⁰; this guidance outlines the demonstration of housing capacity through the following steps:

1. Summarize land capacity by zone.
2. Categorize zones by allowed housing types and density level
3. Relate zone categories to potential income levels and housing types served
4. Summarize capacity by zone category
5. Compare projected housing needs to capacity
6. (If deficit is found) Implement actions to increase capacity for one or more housing needs. Then re-assess capacity (Step 1) based on actions.

1. Summarize land capacity by zone

In the context of recent HBs (HB 1220 and HB 1337), the City has identified capacity for all housing needs in three areas:

1. Zoned capacity – Capacity from vacant and redevelopable land or from pipeline development projects.
2. Accessory Dwelling Unit Capacity (HB 1337) – Potential capacity for the construction of ADUs on existing and future residential lots based on assumed production rates.
3. Emergency Housing Capacity (HB 1220) – Capacity for the City to provide for emergency housing needs based on available land and other opportunities.

Zoned Capacity

The table below summarizes zoned housing capacity identified in Stage 2 of the LCA.

Housing Capacity (Units)				
Zone	Initial	(Displaced)	Pipeline	Total
(C-1) Neighborhood Commercial District	0	(0)	0	0
(C-2) Commercial District	0	(0)	0	0
(DC) Downtown Core District	8	(0)	0	8
(DM) Downtown Mixed Use District	27	(1)	24	50
(E) Easttown District	0	(6)	48	42
(MC) Midtown Core District	0	(1)	0	(1)
(PF) Public Facilities District	0	(0)	0	0
(R1) Low-Density Residential District	576	(175)	71	472
(R2) Medium-Density Residential District	180	(74)	12	118
(R3) High-Density Residential District	320	(68)	672	924
(RC-5) Residential/Conservation District	37	(2)	1	36
Total	1,148	(327)	828	1,649

Table 10 – Housing Capacity Summary

¹⁰ WA Commerce, HB 1220 Book 2 Housing Element Update (August 2023), p.19

Accessory Dwelling Unit Capacity (House Bill 1337)

HB 1337 was passed during the 2023 legislative session. The provisions of this bill must be implemented by the City no later than June 30, 2025. The bill states that if a city or county does not amend their rules to be consistent with the law, the provisions of the law “**supersede, preempt and invalidate any conflicting local development regulations.**” ([Session law](#) adopting HB 1337, p. 5, lines 14-15).

Recent changes to state law require cities to allow up to two Accessory Dwelling Units (ADUs) on all lots¹¹ zoned to allow single-family homes, provided the lots meet or exceed the minimum lot size for the zone; in Bonney Lake, this includes the R1, R2, and RC5 zones. There are 7,188 parcels in the R1, R2, and RC5 zoning districts. After excluding various land uses, parcels with critical areas, and parcels with capacity as determined in the LCA, 3,719 lots are eligible for 2 ADUs per HB 1337. Including lots that could add an ADU that have LCA capacity (vacant, underutilized, or vacant single unit) brings the total ADU-eligible lots to 4,261.

Commerce recommends basing estimated ADU production on an estimated participation rate based on the Real Estate market of the jurisdiction¹². The estimated participation rate was inferred from analysis of recent development in the City. Seven ADUs were permitted in the last three years, which equates to approximately 2.3 ADUs per year. For this LCA, the City assumed that ADU production would increase due to regulation changes required by HB 1337 and expects approximately 5.35 ADUs per year in the 2024-2044 planning period. Extrapolated out over the next 20 years, the City could plan for an additional 107 ADUs by 2044.

Based on an analysis of ADUs built in the last five years, the City assumed a 2% participation rate; this accounts for owners who do not have the means or the desire to build ADUs. Additionally, the City assumed an average of 1.25 ADUs per lot; currently, there are no lots identified in the City that have more than one ADU, but considering the new requirements of HB 1337, lots with two ADUs could exist in the future. Applying this analysis, the City has capacity for 107 ADUs on 85 lots.

ADU Development Capacity				
Available Lots	Participation Rate	Potential ADU Lots	ADUs per Lot	2044 ADU Capacity
4,261	2.00%	85	1.25	107

Table 11 – HB 1337 ADU Capacity

Emergency Housing Capacity (House Bill 1220)

HB 1220 included the addition of Emergency Needs Housing Requirements. These requirements are applicable to all jurisdictions that have been assigned Emergency Needs Housing targets, of which the City has been assigned 334 beds. The bill requires that jurisdictions allow for siting of indoor emergency housing or indoor emergency housing shelters where hotels are allowed or within “a majority of zones within a one-mile proximity to transit.” The City lacks any zones permitting Hotels and has one Park & Ride serviced by Sound Transit.

In this LCA, the City accounted for Emergency Housing capacity by dedicating a portion of the vacant land identified for Emergency Housing use. The City selected vacant land because it is more likely to feasibly support the development of Emergency Housing, and the City did not specify specific sites for this Emergency Housing provision because they do not have any regulations limiting the siting, spacing, or intensity of Emergency Housing uses. The City removed a total of 8 acres from the E and PF zones in the LCA and estimated provision for emergency housing according to Commerce Guidance¹³ and an assumed construction of Tiny shelter villages and Emergency Congregate shelters.

¹¹ Lots with critical areas or their buffers are exempt from the requirements of HB 1337.

¹² WA Commerce, HB 1220 Book 2 Housing Element Update (August 2023), p.28

¹³ WA Commerce, HB 1220 Book 2 Housing Element Update (August 2023), p.47-48

Emergency Housing Capacity						
Site Grouping	Acres	Density	Capacity (beds or units)	Total Capacity	(Total need)	Capacity Surplus (or Deficit)
Tiny shelter villages	4	30 units/acre	120	360	(334)	26
Emergency Congregate Shelter	4	60 beds/acre	240			

Table 12 – Emergency Housing Capacity Summary

The City has sufficient capacity in the PF and E zones to meet its Emergency Housing target. The City will need to take steps to ensure this housing is provided, some steps might include coordinating with local shelters or other providers of Emergency Housing and applicable services, pursuing sources of funding for Emergency Housing projects, and including public engagement in the necessary siting of Emergency Housing uses.

Housing Capacity Subtotal

Housing capacity provided by zoning, pipeline projects, and ADU production contributes toward the City's total 2044 housing target of 1,451 residential units. This LCA has identified approximately 391 acres of vacant and underutilized land available for future residential development in the City. Without considering housing needs for income brackets, the City has capacity for 2,438 residential units and has a housing capacity surplus of 987 residential units. The below table shows the residential outcomes of the LCA against the 2044 and 2049 targets.

Housing	2020-2044	2020-2049
2020-2023 Permitted Growth	682	682
Pipeline projects	828	828
Zoned Housing capacity	821	821
ADU Capacity	107	107
Total Housing Capacity	2,438	2,438
(Housing Target)	(1,451)	(1,977)
Housing Capacity Surplus (or deficit)	987	461

Table 13 – Housing Growth Target Progress

2. Categorize zones by allowed housing types and density level

Commerce has developed a framework for determining potential housing affordability. The framework requires the compilation of permitted housing types and maximum allowed density in each zone to assign zones into "Zone Categories" which can be used to better understand how effective the capacity identified in the LCA is at serving "all housing needs."

*Housing costs and affordability can vary significantly by housing type, and housing types and densities are determined in part by zoning and other local development regulations. For example, subsidized affordable housing projects are most feasible to produce in low-rise or mid-rise multifamily zones that allow for multi-unit housing production, such as apartment buildings.*¹⁴

The table to the right shows zone categories from Commerce guidance that are applicable to zones in Bonney Lake.

Zone Category	Typical Housing Types Allowed
Low Density	Detached single-family homes
Moderate Density	Townhomes, duplex, triplex, quadplex
Mid-Rise Multifamily	Apartments or condominiums in buildings with ~4-8 floors (~40-85 feet in height)

Table 14 – Zone Density Categories

Based on this framework, the City's residential zones can be classified into the following categories:

Bonney Lake Residential Zone Density Categories				
Zone	Housing Types Allowed	Min Density Required	Max Density Allowed	Assigned Zone Density Category
(DC) Downtown Core District	Apartments or condominiums, Residential over Ground Floor Retail	10.00 Du/Ac	None	Mid-Rise Multifamily
(DM) Downtown Mixed Use District	Apartments or condominiums, Residential over Ground Floor Retail	10.00 Du/Ac	None	Mid-Rise Multifamily
(R1) Low-Density Residential District	Detached single-family homes	4.00 Du/Ac	5.00 DU/Ac	Low Density
(R2) Medium-Density Residential District	Detached single-family homes, duplex, triplex and quadriplex	5.00 Du/Ac	9.00 DU/Ac	Moderate Density
(R3) High-Density Residential District	Apartments or condominiums, townhouses, Duplexes	10.00 Du/Ac	None	Mid-Rise Multifamily
(RC-5) Residential/Conservation District	Detached single-family homes	None	0.20 DU/Ac	Low Density

Table 15 – Bonney Lake Zone Density Categories

¹⁴ WA Commerce, HB 1220 Book 2 Housing Element Update (August 2023), p.30

3. Relate zone categories to potential income levels and housing types served

Depending on the housing types permitted in a zone, different income levels' housing needs are more likely to be served. The table below outlines the potential income levels served depending on housing type and market rate or subsidized housing; this is based on a standard table provided by Commerce¹⁵. Household income segments refer to households that are affordable to households at specified AMIs. Income levels are based on the Area Median Income (AMI); in the City, the 2018-2022 Median Income was \$123,462¹⁶. See table to right for Household Income Levels.

Income Levels	
Income Level	Relative AMI
Extremely Low Income	<=30% AMI
Very Low Income	>30% and <=50% AMI
Low Income	>50% and <=80% AMI
Moderate Income	>80% and <=120% AMI
High Income	>120% AMI

Table 16 – Household Income Levels

Zone Category Incomes Served				
Zone Category	Housing Types Served	Lowest Potential Income Level Served		Assumed Affordable Income Level for LCA
		Market Rate	With Subsidies	
Low Density	Single-Family Detached	High Income	Not feasible at scale	High Income
Moderate Density	Townhomes, duplex, triplex, quadplex	Moderate Income	Not feasible at scale	Moderate Income
Mid-Rise Multifamily	Apartments or condominiums in buildings with ~4-8 floors	Low Income	Extremely Low - Very Low Income	Low - Extremely Low Income and PSH
ADUs (all zones)	ADUs on developed residential lots	Moderate Income	N/A	Moderate Income

Table 17 – Zone Category Incomes Served

¹⁵ WA Commerce, HB 1220 Book 2 Housing Element Update (August 2023), Exhibit 12, p.33

¹⁶ Data from US Census Bureau: QuickFacts, Bonney Lake city, Washington

4. Summarize capacity by zone category

The table below shows zoned capacity from the LCA and compiles it based on the zone density category.

Pipeline projects are not included in this categorization; specific knowledge about the built condition or the proposed projects in the pipeline lends a more accurate measure of what income levels are being served. The table below summarizes recent projects in the permitting pipeline by housing type and income level.

In addition to Pipeline development, the 682 dwelling units constructed since the BLR are accounted for in the table below.

Zoned Capacity by Density			
Zone	Capacity (LCA)	Zone Density Category	Capacity in Zone Density Category
DC	8	Mid-Rise Multifamily	286
DM	26		
R3	252		
R2	106	Moderate Density	106
R1	401	Low Density	436
RC5	35		
ADUs (any zone)	107	ADUs	107
Total	935¹⁷		

Table 18 – Zoned Capacity by Density

Pipeline Development			
Type	Permitted Units	Density Category	Capacity Built Density Category
Multi-Family	280	Mid-Rise Multifamily	280
Townhouse	175	Moderate Density	175
ADU	0	ADU	0
Single-Family Detached	373	Low Density	373
Total	828		

Table 19 – Pipeline Development by Density

2020-2023 Development			
Type	Permitted Units	Density Category	Capacity Built Density Category
Multi-Family (<60% AMI) ¹⁸	408	Mid-Rise Multifamily	408
Multi-Family	97	Mid-Rise Multifamily	97
Townhouse	0	Moderate Density	0
ADU	7	ADU	7
Single-Family Detached	170	Low Density	170
Total	682		

Table 20 – 2020-2023 Development by Density

¹⁷ This total does not account for 7 residential units displaced in the E and MC zones; since these units aren't being displaced by residential development and do not constitute a significant loss of housing, they are not counted against affordable housing capacity. The net zoned capacity of 927 units is reflected in Table 10.

¹⁸ Multi-family project, "View by Vintage" built between 2021 and 2023, all units were limited to residents with income less than 60% AMI for the next 50 years as the project received low interest loans from the Washington State Housing Trust Fund.

5. Compare projected housing needs to capacity

The adopted income housing targets previously shown (Table 9) are compared to the identified capacity (**Error! Reference source not found.**, **Error! Reference source not found.**, and **Error! Reference source not found.**) in the below table (Table 21). The first two columns are a column-to-row flip of the income housing targets table (Table 9); the remaining columns show the calculations based on the category capacity established on the previous page. Zoned capacity fills higher income brackets before lower ones due to market pressures, pipeline and built capacity is specifically assigned to income categories based on development type and whether the development was market-rate or included an affordable housing component.

Income Housing Target Capacity Summary							
Income Level	Projected Housing Need	Aggregate d Housing Needs	2020-2023 Permitted Growth	Total Pipeline Capacity	Zone Categories Serving These Needs	Total Zoned Capacity	Capacity Surplus (or Deficit)
0 - 30% PSH	187	709	0	0	Mid-Rise Multifamily	286	(423)
0 - 30% Non-PSH	253						
>30 - 50%	269						
>50 - 80%	213	213	408	0	Mid-Rise Multifamily	0	195
>80 - 100%	92	175	104	455	Mid-Rise Multifamily, Moderate Density, and ADUs	213	597
>100 - 120%	83						
>120%	354	354	170	373	Low Density	436	625
Total	1,451		682	828		935	

Table 21 – Income Housing Target Capacity Summary

Sufficient Capacity

The current zoned and built capacity is sufficient to meet the needs of households with incomes greater than 50% AMI. Plenty of single-family housing has been built and is in the pipeline, effectively serving the need for greater than 120% AMI households. Additionally, townhouse and multi-family developments have provided ample capacity for households between 80% and 120% AMI. The 50% to 80% target is met solely by the View By Vintage project which constructed 408 income restricted dwelling units that will be income restricted until year 2070 and is than enough to serve the projected need.

Insufficient Capacity

Housing targets for households making less than 50% AMI have not seen any measurable progress since 2020. The combined housing need for households under 50% AMI is 709 units. Current buildable land in Mid-Rise zones does not seem sufficient to meet these targets. The R3, DM, and DC zones have a combined capacity of 286 units, so the total shortfall for households under 50% AMI is 423 units. Yet, this assumes that all the 286 units of zoned capacity would need to be allocated to households <50% AMI, which is unlikely without substantial changes to development regulations. An increased capacity for Mid-Rise Multi-Family residential development and measures to incentivize income restricted development serving Low and Extremely Low incomes may be required to meet these targets.

6. (If deficit is found) Implement actions to increase capacity for one or more housing needs. Then re-assess capacity (Step 1) based on actions.

Note that though the R3, DM, and DC zones have an assumed density of 15 units per-acre in this LCA, higher densities are likely feasible. The City's DC, DM, and R3 zoning classification have a minimum density of 10 units per net acre, but no maximum density. All the zones permit buildings of at least 4 stories of 45 feet, and the DC and DM allow buildings up to seven stories.

The R3 zone has approximately 42.4 acres of land available for residential development with 68 existing units on redevelopable parcels. Including displaced units, the assumed density would have to be increased to just 18.3 to produce a net 709 units. It is possible for the City to accommodate the adopted housing need, but action on behalf of the City will be necessary to ensure this housing capacity deficit solution is implemented.

Conclusion

In partnership with LDC, the City has analyzed development capacity for the 2024-2044/2049 planning period according to Pierce County BLR and Commerce guidance applicable to new State regulations implementing HBs 1220 and 1337. The LCA updates the Buildable Lands Inventory in the 2021 BLR and documents the City's progress towards its Housing and Employment growth targets.

The City has been continually growing and expanding the selection of housing that it allows and is serving a greater range of household incomes than before.

This LCA found the City has ample capacity to meet its employment and Emergency Housing growth targets and has an excess of housing capacity for Low-to-High income households and has a housing capacity deficit for those within very low and extremely low-income households. This housing capacity deficit is due to the lack of low-income serving housing solutions and would require the City to plan to provide an additional 423 residential units by 2044. Given the shortfall in housing capacity, the City has evaluated growth alternatives to accommodate its housing target; these are outlined in the Growth Alternatives memorandum and support the City's commitment to meeting its adopted growth targets.

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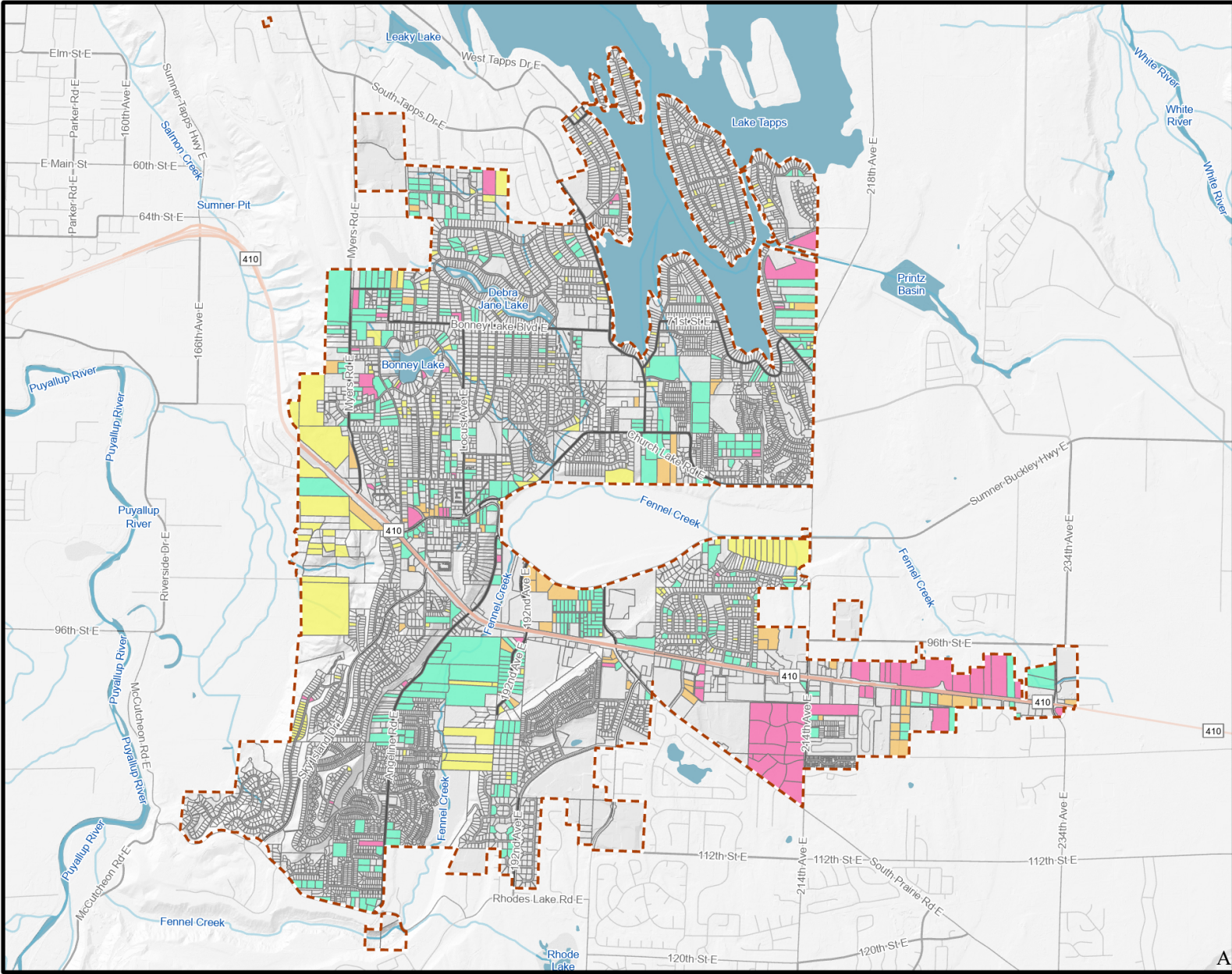
Appendices

(2024). *Appendix A – LCA Zone Assumptions*

(2024). *Appendix B – 2024 Buildable Lands Inventory Map*

(2024). *Appendix C – Zoning Map*

Appendix A - Bonney Lake 2024 LCA Zone Assumptions													
Zone	Zone Type	Residential			Employment		Residential Market Factor		Non-Residential Market Factor		Plat Deductions (ROW, Stormwater, Open Space, Non- Residential)	Non-residential Use in Residential Zone	Assumed Density
		Mixed-Use Split	Density	Min Lot	Mixed-Use Split	Density	Vacant	Underutilized	Vacant	Underutilized			
C1	MIX COM	50%	6	0	50%	20	15%	35%	15%	35%	0%	0%	6.00
C2	MIX COM	0%	0	0	100%	20	15%	35%	15%	35%	0%	0%	0.00
DC	MIX COM	20%	15	0	80%	20	15%	35%	15%	35%	0%	0%	15.00
DM	MIX COM	50%	15	0	50%	20	15%	35%	15%	35%	0%	0%	15.00
E	IND	0%	0	0	100%	9	15%	35%	15%	35%	0%	0%	0.00
MC	COM	0%	0	0	100%	20	15%	35%	15%	35%	0%	0%	0.00
PF	COM	0%	0	0	100%	20	15%	35%	15%	35%	0%	0%	0.00
R1	RES	100%	4	0.5	0%	20	15%	30%	0%	0%	20%	5%	4.00
R2	RES	100%	6	0.49	0%	20	15%	30%	0%	0%	20%	5%	6.00
R3	RES	100%	15	0.3	0%	20	15%	30%	0%	0%	20%	5%	15.00
RC5	RES	100%	0.2	12.5	0%	20	15%	30%	0%	0%	20%	5%	0.20



**2024 Buildable Lands
Inventory**

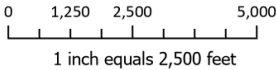
Legend

- City Boundary
- Built Out/
Undevelopable
- Pipeline
- Underutilized
- Vacant
- Vacant Single
Unit



This map is a geographic representation based on information available at the time of production. Bonney Lake disclaims any warranty concerning the accuracy, currency, or completeness of the data depicted.

*Base Map Service layers:
Washington Geological Survey, King County, WA State Parks
GIS, Esri, TomTom, Garmin, SafeGraph, GeoTechnologies,
Inc, METI/NASA, USGS, Bureau of Land Management, EPA,
NPS, US Census Bureau, USDA, USFWS*



2044 Growth Alternatives Memo

To: Jason Sullivan – Interim Public Services Director, City of Bonney Lake

From: Dane Jepsen, Associate Planner, LDC Inc.

CC: Kim Mahoney, Principal Planner, LDC Inc.

Date: March 29, 2024

Re: City of Bonney Lake 2024 Comprehensive Plan Update

Executive Summary

During the City of Bonney Lake's (City) 2024 Comprehensive Plan update, LDC, Inc. (LDC) performed a Land Capacity Analysis (LCA) to assess the City's capacity to serve the projected housing and employment needs for the 2020-2044 and 2020-2049 planning periods¹. The LCA found that the City has ample capacity to meet its employment and Emergency Housing growth targets and has an excess of housing capacity for Low-to-High income households. However, this analysis found that the City has a housing capacity deficit for those within very low and extremely low-income households. This housing capacity deficit is due to the lack of low-income-serving housing solutions and would require the City to plan to provide an additional 423 residential units by 2044.

Per RCW 36.70A (the Growth Management Act [GMA]), the City is required to identify and implement corrective actions that will accommodate the adopted housing growth target; the City has evaluated two growth alternatives to accommodate its housing target:

Alternative One: "Stay the Course"

Alternative Two: "Bend the Trend"

This memorandum further details the background, methodology, overview, and analysis results of the City's considered growth alternatives.

Background

Puget Sound Regional Council (PSRC) is a multi-county planning organization that coordinates the planned growth of the Puget Sound region needed to accommodate future housing and employment needs. Through its *VISION 2050* plan, PSRC coordinated a target for total regional population growth and the adoption of county-wide population, employment, and housing targets for its member counties. In the PSRC Vision 2050, the City is identified as one of the geographies accepting a lower portion of the regions' housing and employment growth.

VISION 2050 includes plans for housing and employment capacity in the following geographies:

- Metropolitan Cities
- Core Cities
- High Capacity Transit (HTC) Communities
- Cities & Towns
- Rural Unincorporated Areas
- Rural

The City of Bonney Lake was placed within "Cities & Towns" category, which means that the City is expected to accommodate a small portion of the region's needs relative to its size. The housing and employment growth targets adopted by Pierce County on July 7, 2023 reflect the planned growth

¹ 2020-2044 growth targets adopted July 7, 2023 under Pierce County Ordinance No. 2023-22s, 2020-2049 growth targets extend the 2044 target based on projected growth rate.

assigned to Pierce County in *VISION 2050*; therefore, the City's planning to accommodate its growth targets inherently participates in the much wider regional plan, as well. In the 2024 Comprehensive Plan update, the City is faced with decisions about how it will plan to meet its housing and employment targets. In the past, the City has met rising housing needs through development of single-family and multi-family housing, with an increasing portion of new multi-family units (Figure 1). In an effort to explore methods for accommodating its housing growth targets, the City has considered one alternative of "staying the course" (Alternative One), whereby its recent trends of housing development could serve the growing need for housing, and another alternative, "bending the trend" (Alternative Two), whereby a refreshed perspective to housing development could more adequately serve housing needs in the City.

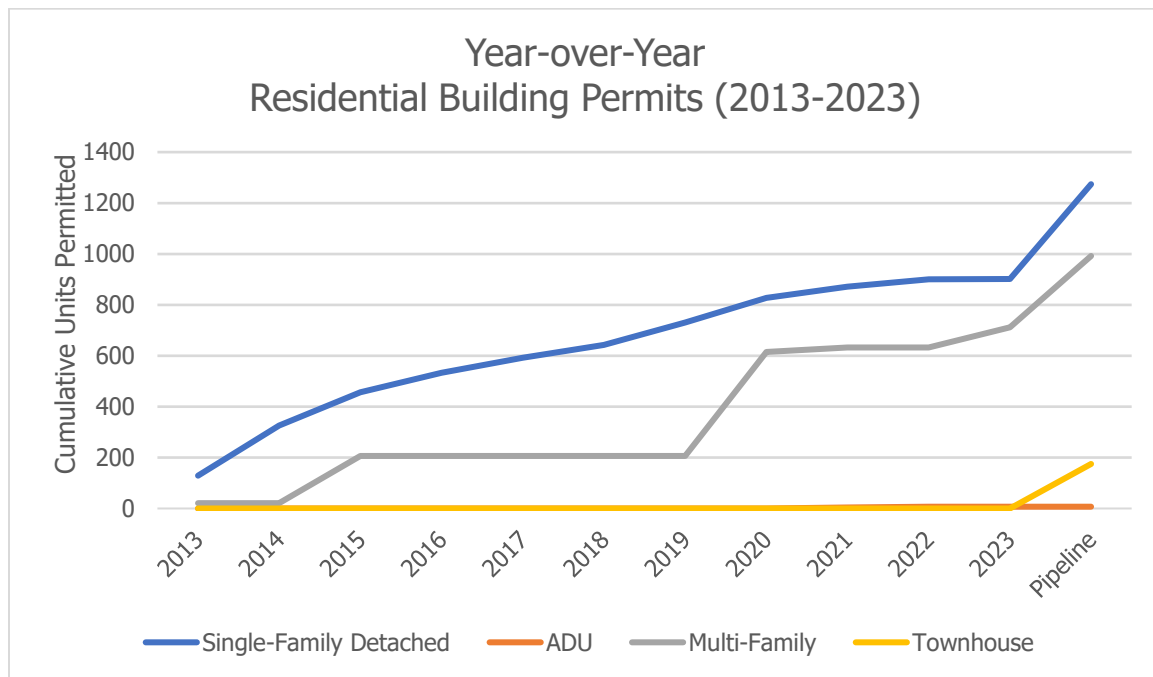


Figure 1 – Year-over-Year Residential Building Permits (2013-2023)

Methodology

The two proposed growth alternatives were evaluated for potential housing and employment capacity using the same methodology outlined in the LCA memo; this includes the same zone assumptions and the same process for identifying lands as Vacant, Vacant Single Unit, Underutilized, Pipeline, and Built Out/Undevelopable. Two specific changes were incorporated in the analysis of these growth alternatives: changes to capacity in the (PF) Public Facility zone, and removal of the Midtown Pipeline project. See these changes outlined below:

Public Facilities Zone Capacity

In the LCA, no housing or employment capacity was designated on publicly owned land. Development of public land does not respond to market pressure the way private development does, and LCA assumptions cannot predict the likelihood of a community decision. Yet, while considering growth alternatives, it is acceptable to present the outcomes of growth paths that require said decision making. For this reason, Alternative One included capacity from a selection of publicly-owned parcels on the City Hall campus that have been identified to be favorable for private sale and redevelopment. The *City of Bonney Lake Centers Plan* (Centers Plan) adopted in 2017 envisioned that the former civil campus would be developed with a mix of residential and commercial uses. Under Alternative One, it is assumed that the City would move forward with the zoning changes as part of this periodic update and further implement the Centers Plan. These parcels were designated as vacant since the market factor applicable to underutilized land would not be as prevalent on publicly-owned land. These parcels were rezoned for

Overview

There are two main ways jurisdictions can address housing and employment capacity deficits identified in an LCA:

1. Changing jurisdiction regulations for development related to employment and housing capacity.
2. Changing the zoning map to increase or decrease developable area in specified zones.

The City's proposed growth alternatives only included changes to the zoning map. The remainder of this memo will review the impacts of these zoning changes on projected capacity.

Zoning changes were comprehensively evaluated for every base parcel in the City, allowing the Buildable Lands Inventory to adjust based on proposed zoning changes. Appendix A & B depict the zoning changes that were implemented in the analysis of each alternative, the table below also shows the changes to the gross acreage of each zone proposed by each growth alternative.

Zoned Acres - Alternatives Summary					
Zone	Area (Acres)				
	Base Zoning	Alternative One		Alternative Two	
		Total Acres	Change Addition or (Reduction)	Total Acres	Change Addition or (Reduction)
(C-1) Neighborhood Commercial District	0.00	14.47	14.47	0.00	0.00
(C-2) Commercial District	114.27	172.47	58.20	83.49	(30.79)
(DC) Downtown Core District	8.24	6.48	(1.76)	7.08	(1.16)
(DM) Downtown Mixed Use District	20.88	45.00	24.13	33.01	12.13
(E) Easttown District	166.27	166.27	0.00	166.48	0.21
(MC) Midtown Core District	236.05	178.15	(57.90)	226.42	(9.63)
(PF) Public Facilities District	508.87	512.81	3.94	524.21	15.34
(R1) Low-Density Residential District	2289.44	2,223.11	(66.33)	2531.41	241.96
(R2) Medium-Density Residential District	282.73	182.70	(100.03)	0.00	(282.73)
(R3) High-Density Residential District	155.73	260.23	104.50	158.46	2.73
(RC-5) Residential/Conservation District	410.06	430.85	20.79	461.99	51.93
Total	4192.54	4192.54		4192.54	

Table 1 – Zoned Acres - Alternatives Summary

Both Alternatives feature overall reductions in the DC, MC, and R2 zones and additions in the DM, PF, R3, and RC-5 zones. Alternative One utilizes the C-2 and R3 zones much more than Alternative Two while reducing the area of the MC, R1, and R2 zones. Alternative Two utilizes the R1 and RC-5 zones more than Alternative Two while reducing the C-2 zone and outright removing the R2 zone.

Alternative One: "Stay the Course"

Alternative One seeks to achieve projected housing growth targets through the amplification of its current development pattern. This includes the reduction of medium-to-low density residential zones (R1 and R2) while increasing zoned acreage in the high density and mixed-use zones (R3, C-1, and DM) to maximize

the potential for affordable housing development. This growth alternative also includes an increase in the area of the (RC-5) Residential/Conservation District as a reflection of the City's priority to preserve its natural land and open space while preventing sprawl. This growth alternative's focus on providing increased housing capacity by adding zoned acreage to the R3, C-1, and DM zones would likely result in a greater coverage of moderate density housing throughout the City with an increased opportunity for mixed-use and inclusive development patterns.

Alternative Two: "Bend the Trend"

Alternative Two seeks to achieve projected housing growth targets through a focus on smaller scale development with a sufficient portion of zoning dedicated densities that support low-income housing development. This alternative was developed to explore whether it was possible to reduce the City's overall growth rate consistent with goals of VISION 2050, while at the same time complying with the requirements of RCW 36.70A.070(2) to provide housing to all income segments as determined by the Department of Commerce. This alternative was also developed to focus housing within two specific centers: Downtown and Midtown, consistent with VISION 2050; specifically, MPP-RGS-11, MPP-DP-26, MPP-H-7 and MPP-EC-20. These policies call on the Puget Sound Region to develop a framework of countywide centers and focus the development of housing and economic growth within these centers. The City's Downtown Center is already classified as a Countywide Growth Center. As part of this update, the City will be taking steps to have the Midtown Center classified as a Countywide Growth Center. This includes the elimination of the (R2) Medium-Density Residential District, which would comprise of mostly rezoned (R1) Low-Density Residential District land, and an increase of approximately 30 acres in the R3 and DM zones. This growth alternative's focus on lower density zoning outside of these Centers and the provision of higher density housing through the R3 and DM zones within the Centers would result in a slower build-out of lower density neighborhoods with the majority of high-density housing developing in dense mixed-use centers to achieve the dual objectives of slowing the City's overall growth rate while providing housing for all economic segments within the City.

Alternative Analysis Results

In this analysis, growth alternative capacity is summarized and presented in the same format that was used to present housing and employment capacity in the LCA. This analysis will compare the capacity results of the proposed growth alternatives with the results determined based on existing zoning in the LCA.

Employment Capacity

Employment capacity identified in the LCA was more than sufficient to satisfy the City's employment growth targets. The proposed alternatives included planned zoning changes reflected in the City's current Comprehensive Plan map designations and deductions of commercial and industrial zones for the purposes of meeting housing capacity needs; these changes in zoning yielded changes in projected employment capacity; the table below summarizes alternatives changes in capacity and compares them against the employment growth target:

Employment Capacity - Alternatives Summary					
Zone	Base Zoning	Alternative One		Alternative Two	
		Total Jobs	Change Addition or (Reduction)	Total Jobs	Change Addition or (Reduction)
(C-1) Neighborhood Commercial District	0	76	76	0	0
(C-2) Commercial District	200	416	216	165	(35)
(DC) Downtown Core District	2	2	0	2	0
(DM) Downtown Mixed Use District	32	128	96	63	31
(E) Eastown District	258	258	0	258	0
(MC) Midtown Core District	422	188	(234)	326	(96)
(PF) Public Facilities District	0	0	0	0	0
(R1) Low-Density Residential District	246	236	(10)	289	43
(R2) Medium-Density Residential District	53	33	(20)	0	(53)
(R3) High-Density Residential District	43	203	160	95	52
(RC-5) Residential/Conservation District	36	37	1	37	1
Total Zoned Capacity	1,292	1,577	285	1,235	(57)
2020-2023 Permitted Growth	504	504		504	
Pipeline projects	684	684		684	
Total Employment Capacity	2,480	2,765		2,423	
(Employment Target)	(1,717)	(1,717)		(1,717)	
Employment Capacity Surplus (or deficit)	763	1,048		706	

Table 2 – Employment Capacity - Alternatives Summary

Analysis of both growth alternatives identified sufficient capacity for future employment targets with Alternative One producing slightly more and Alternative Two slightly less employment capacity than current zoning.

Housing Capacity

As in the LCA, housing capacity for proposed growth alternatives should demonstrate capacity for affordable housing to all economic segments. Washington State Department of Commerce has provided guidance² for demonstrating this utilizing the following steps:

1. Summarize land capacity by zone.
2. Categorize zones by allowed housing types and density level.
3. Relate zone categories to potential income levels and housing types served.
4. Summarize capacity by zone category.
5. Compare projected housing needs to capacity.
6. (If deficit is found) Implement actions to increase capacity for one or more housing needs. Then re-assess capacity (Step 1) based on actions.

The LCA summarized current projected housing capacity using these steps and some of the analysis utilized there will be reused in the growth alternatives capacity analysis. The proposed alternatives involve changes to only the zoning map; resultantly, steps 2 and 3 do not need to be re-evaluated to demonstrate capacity. Step 6 was executed through this memo's analysis of the proposed growth targets. Analysis of Housing capacity for growth alternatives will include the following steps:

1. Summarize land capacity by zone.
4. Summarize capacity by zone category.
5. Compare projected housing needs to capacity.

1. Summarize land capacity by zone

The LCA identified housing capacity in three areas: zoned capacity, Accessory Dwelling Unit (ADU) capacity, and Emergency Housing Capacity. The proposed alternatives resulted in different outcomes for zoned and ADU capacity, but Emergency Housing capacity remained the same. Eight acres of vacant land were identified in the LCA for Emergency Housing Capacity; the same area of vacant land was reserved from the proposed alternatives, resulting in no change to projected Emergency Housing capacity. Housing capacity for the proposed growth alternatives was identified in two areas:

1. Zoned capacity – Capacity from vacant and redevelopable land.
2. Accessory Dwelling Unit Capacity (House Bill [HB] 1337) – Potential capacity for the construction of ADUs on existing and future residential lots based on assumed production rates.

² WA Commerce, HB 1220 Book 2 Housing Element Update (August 2023), p.19

Zoned Capacity

The table below summarizes zoned housing capacity identified in this alternative analysis and compares it to that identified in the LCA. Zoned capacity is the net result of initial units minus displaced units.

Housing Capacity - Alternatives Summary					
Zone	Base Zoning	Alternative One		Alternative Two	
		Total Units	Change Addition or (Reduction)	Total Units	Change Addition or (Reduction)
(C-1) Neighborhood Commercial District	0	14	14	0	0
(C-2) Commercial District	0	0	0	0	0
(DC) Downtown Core District	8	7	(1)	7	(1)
(DM) Downtown Mixed Use District	26	116	90	57	31
(E) Eastown District	-6	-6	0	-6	0
(MC) Midtown Core District	-1	-1	0	-4	(3)
(PF) Public Facilities District	0	0	0	0	0
(R1) Low-Density Residential District	401	378	(23)	464	63
(R2) Medium-Density Residential District	106	65	(41)	0	(106)
(R3) High-Density Residential District	252	1,237	985	822	570
(RC-5) Residential/Conservation District	35	37	2	42	7
Total	821	1,847	1026	1,382	561

Table 3 – Housing Capacity - Alternatives Summary

Accessory Dwelling Unit Capacity (HB 1337)

Projected ADU capacity fluctuated between the proposed growth alternatives due to rezones affecting the future production of single-family lots in the City. The alternatives analysis utilized the same assumptions as the LCA: 2% participation factor for available lots and 1.25 ADUs constructed per participating lot. The table below outlines ADU capacity for each alternative.

ADU Development Capacity – Alternatives Summary			
	Base Zoning	Alternative One	Alternative Two
Available Lots	4,260	3,906	4,258
Potential ADU Lots	85	78	85
2044 ADU Capacity	107	97	106³

Table 4 – ADU Development Capacity - Alternatives Summary

³ 2044 projections for ADU capacity are rounded from the nearest tenth decimal place, resulting in a slight difference between base and alternative two ADU capacity.

Housing Capacity Subtotal

Housing capacity provided by zoning, pipeline projects, and ADU production contributes toward the City's total 2044 housing target of 1,451 residential units. Without considering housing needs for income brackets, total housing capacity provided by proposed growth alternatives exceeds projected housing targets. Notably, Alternative Two has a surplus 112 units lower than that provided by base zoning.

Housing	Base Zoning	Alternative One	Alternative Two
2020-2023 Permitted Growth	682	682	682
Pipeline projects	828	156	156
Zoned Housing capacity	821	1,847	1,382
ADU Capacity	107	97	106
Total Housing Capacity	2,438	2,782	2,326
(2020-2044 Housing Target)	(1,451)	(1,451)	(1,451)
Housing Capacity Surplus (or deficit)	987	1,331	875

Table 5 – Housing Capacity Subtotal

4. Summarize capacity by zone category

Zone density categories identified in the LCA are applicable in the analysis of the proposed growth alternatives. Zoned, pipeline, and built capacity were totaled by zone density category; zoned and pipeline capacity had different quantities than were presented in the LCA; built capacity was not affected by the proposed alternatives, for reference see the LCA Memo Table 20.

The table below shows zoned capacity from the alternatives LCA and compiles them based on the zone density category.

Zoned Capacity by Density - Alternative Comparison									
Zone Density Category	Zone	Base Zoning		Alternative One			Alternative Two		
		Zoned Capacity	Capacity in Zone Density Category	Zoned Capacity	Capacity in Zone Density Category	Change Addition or (Reduction)	Zoned Capacity	Capacity in Zone Density Category	Change Addition or (Reduction)
Mid-Rise Multi-family	DC	8	286	7	1,360	1047	7	886	600
	DM	26		116			57		
	R3	252		1,237			822		
Moderate Density	R2	106	106	65	65	(41)	0	0	(106)
Low Density	R1	401	436	378	415	(21)	464	506	70
	RC5	35		37			42		
ADUs	ADUs (any zone)	107	107	97	97	(10)	106	106	(1)
Total		935		1,937			1,498		

Table 6 – Zoned Capacity by Density - Alternatives Comparison

The proposed alternatives produced significantly more than base capacity in the “Mid-Rise Multi-family” zone density category, with Alternatives One and Two improving on base capacity by 1047 and 600 units, respectively. Proposed zoning changes did no-doubt affect this capacity projection, but the biggest factor in this increase is the removal of the Midtown pipeline project. At 672 units, the Midtown pipeline project made up approximately 73% of the total housing capacity in the R-3 zone, but it did not have any affordable housing provision. Thus, its pipeline capacity only applied to income brackets greater than 80% AMI. Returning the Midtown project site’s land to vacant capacity re-introduced the possibility of adding affordable housing with its development; for example, Alternative Two only expanded the R-3 zone by 6.9 acres, and still all 822 units of zoned capacity can count towards incomes served by the “Mid-Rise Multi-family” zone density category.

Pipeline projects utilized in the alternatives analysis differ from the LCA due to the removal of the Midtown Project. The table below summarizes pipeline projects used in this analysis by housing type and income level.

Pipeline Development			
Type	Permitted Units	Density Category	Capacity Built Density Category
Multi-Family	72	Mid-Rise Multi-family	72
Townhouse	0	Moderate Density	0
ADU	0	ADU	0
Single-Family Detached	84	Low Density	84
Total	156		

Table 7 – Pipeline Development by Density

5. Compare projected housing needs to capacity

Comparison of alternative capacity to each proposed growth alternative was done individually before being compared to the total capacity identified in the LCA.

The adopted income housing targets are compared to capacity identified for each growth alternative (Table 6, Table 7, and LCA Memo Table 20) in the below tables (Table 8 and Table 9). The first two columns are a column-to-row flip of the income housing targets table; the remaining columns show the calculations based on the zone density category capacity established in Housing Capacity – Step 4. Permitted growth and Pipeline capacity have set income brackets they serve based on presence of income restrictions in their existing or proposed provision of housing.

Alternative One - Income Housing Target Capacity Summary							
Income Level	Projected Housing Need	Aggregated Housing Needs	2020-2023 Permitted Growth	Total Pipeline Capacity	Zone Categories Serving These Needs	Total Zoned Capacity	Capacity Surplus (or Deficit)
0 - 30% PSH	187	709	0	0	Mid-Rise Multi-family	1,360	651
0 - 30% Non-PSH	253						
>30 - 50%	269						
>50 - 80%	213	213	408	0	Mid-Rise Multi-family	0	195
>80 - 100%	92	175	104	72	Mid-Rise Multi-family, Moderate Density, and ADUs	161	163
>100 - 120%	83						
>120%	354	354	170	84	Low Density	415	315
Total	1,451		682	156		1,937	

Table 8 – Alternative One - Income Housing Target Capacity Summary

Alternative Two - Income Housing Target Capacity Summary							
Income Level	Projected Housing Need	Aggregated Housing Needs	2020-2023 Permitted Growth	Total Pipeline Capacity	Zone Categories Serving These Needs	Total Zoned Capacity	Capacity Surplus (or Deficit)
0 - 30% PSH	187	709	0	0	Mid-Rise Multifamily	886	177
0 - 30% Non-PSH	253						
>30 - 50%	269						
>50 - 80%	213	213	408	0	Mid-Rise Multifamily	0	195
>80 - 100%	92	175	104	72	Mid-Rise Multifamily, Moderate Density, and ADUs	106	107
>100 - 120%	83						
>120%	354	354	170	84	Low Density	506	406
Total	1,451		682	156		1,498	

Table 9 – Alternative Two - Income Housing Capacity Summary

Previous tables have compared growth alternative capacity directly with LCA capacity; the following table shows how the proposed growth alternatives compare to the base capacity relative to the adopted growth targets.

Affordable Housing Target Capacity - Alternative Comparison							
Income Levels	Aggregated Housing Needs	Base Capacity		Alternative One		Alternative Two	
		Zoned Capacity	Capacity Surplus (or Deficit)	Zoned Capacity	Capacity Surplus (or Deficit)	Zoned Capacity	Capacity Surplus (or Deficit)
0 - 50% PSH & Non-PSH	709	286	(423)	1,360	6531	886	177
>50 - 80%	213	408	195	408	195	408	195
>80 - 100%	175	772	597	338	163	282	107
>120%	354	979	625	669	315	760	406
	1,451	2,445		2,775		2,336	

Table 10 – Affordable Housing Target Capacity - Alternative Comparison

Sufficient Capacity

Base capacity and both growth alternatives all served sufficient capacity for the 50% to 80% AMI income bracket by the View By Vintage project constructed in 2020. Independently, base capacity was only able to provide sufficient capacity to meet the needs of households with incomes greater than 50% AMI; while providing an excess of capacity for moderate-to-high income households (80%-120% AMI).

Zoning proposed in growth Alternative One is projected to have more than enough capacity to meet the needs of residents of all incomes. Excess housing capacity is concentrated in the less than 50% AMI brackets, creating a favorable environment for the construction of low-income and supportive housing types. Additionally, Alternative One provides a wide variety of options for dense forms of housing through use of the R2, R3, C-1, and DM zones; this variety of housing types is also likely to fill the “Missing Middle” gap in the City’s housing stock and better meet the housing needs of its future residents.

Zoning proposed in growth Alternative Two is projected to have sufficient capacity to meet the needs of residents of all incomes. There is little excess housing capacity overall, the majority of capacity overperformance is in the greater than 120% AMI income bracket. The 406 excess units of capacity in the greater than 120% AMI income bracket will likely result in more home-ownership opportunities; these opportunities would only meet the housing needs of a portion of the City’s residents. The three income brackets less than 50% AMI (30-50%, 0-30% PSH & non-PSH) have a total of 177 units of excess capacity between them; the zoning assumptions considered in this LCA ensure that it is possible for the City to deliver on this projected capacity. Still, the City would need to work with low-income housing providers and developers to ensure the needed low-income housing is captured in the development of applicable zones.

Insufficient Capacity

The LCA identified a total shortfall for households under 50% AMI of 423 units. These targets have seen no measurable progress since 2020 and are fully served by the “Mid-Rise Multi-family” zone density category containing the R3, DM, and DC zones. Proposed growth Alternatives One and Two addressed

this capacity shortfall through zoning changes and maximized use of existing zoned area in the R3 zone that can serve low-income housing needs, resulting in no capacity shortfall for either.

2049 Housing and Employment Targets

In addition to the housing and employment targets for 2044 (20 years), the City projected growth to 25 years (2049) and evaluated capacity for each of the proposed alternatives. The tables below outline the results of the two alternatives and compare them to the existing projected capacity.

2049 Housing Target Vs Capacity - Alternatives Summary					
Housing	Base Zoning	Alternative One	Change Addition or (Reduction)	Alternative Two	Change Addition or (Reduction)
Total Housing Capacity	2,438	2,782	344	2,326	(112)
(2020-2049 Housing Target)	(1,977)	(1,977)		(1,977)	
Housing Capacity Surplus (or deficit)	461	805		349	

All alternatives produced a surplus of housing capacity when compared to the City's 2049 housing target. Alternative One resulted in 344 more units of housing than base zoning, while Alternative Two resulted in 112 less units than base zoning.

2049 Employment Target Vs Capacity – Alternatives Summary					
Employment	Base Zoning	Alternative One	Change Addition or (Reduction)	Alternative Two	Change Addition or (Reduction)
Total Employment Capacity	2,480	2,765	285	2,423	(57)
(2020-2049 Employment Target)	(2,129)	(2,129)		(2,129)	
Employment Capacity Surplus (or deficit)	351	636		294	

All alternatives produced a surplus of employment capacity when compared to the City's 2049 employment target. Alternative One resulted in 285 more jobs of housing than base zoning, while Alternative Two resulted in 57 less jobs than base zoning.

The proposed alternatives achieve adopted and projected growth targets and consistently represent the two proposed growth paths for the City's next 25 years of growth.

Conclusion

In partnership with LDC, the City has analyzed housing and employment development capacity for the 2024-2044 planning period based on proposed growth alternatives:

Alternative One: "Stay the Course"

Alternative Two: "Bend the Trend"

This alternative analysis found both alternatives sufficiently provide capacity to meet the City's projected employment and housing needs. While base capacity identified in the LCA found housing capacity

shortfalls for very low-income households, this analysis found that proposed alternatives are projected to meet the needs of residents of all incomes, including very low-income households. Proposed growth alternatives met the existing housing capacity shortfall through rezones and maximized use of existing zoned area in the R3 zone that can serve low-income housing needs.

Given the outcomes of this alternatives LCA indicate that either Alternative One or Alternative Two could serve the housing needs of the community's projected growth, the City will decide which growth alternative is preferable for the City's 2024 Comprehensive Plan update and implement proposed changes along with the adoption of its plan.

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Appendices

(2024). *Appendix A – Alternative One Maps*

(2024). *Appendix B – Alternative Two Maps*

Envision BONNEY LAKE
 Celebrating 100 Years
Alternative One Zoning

Legend

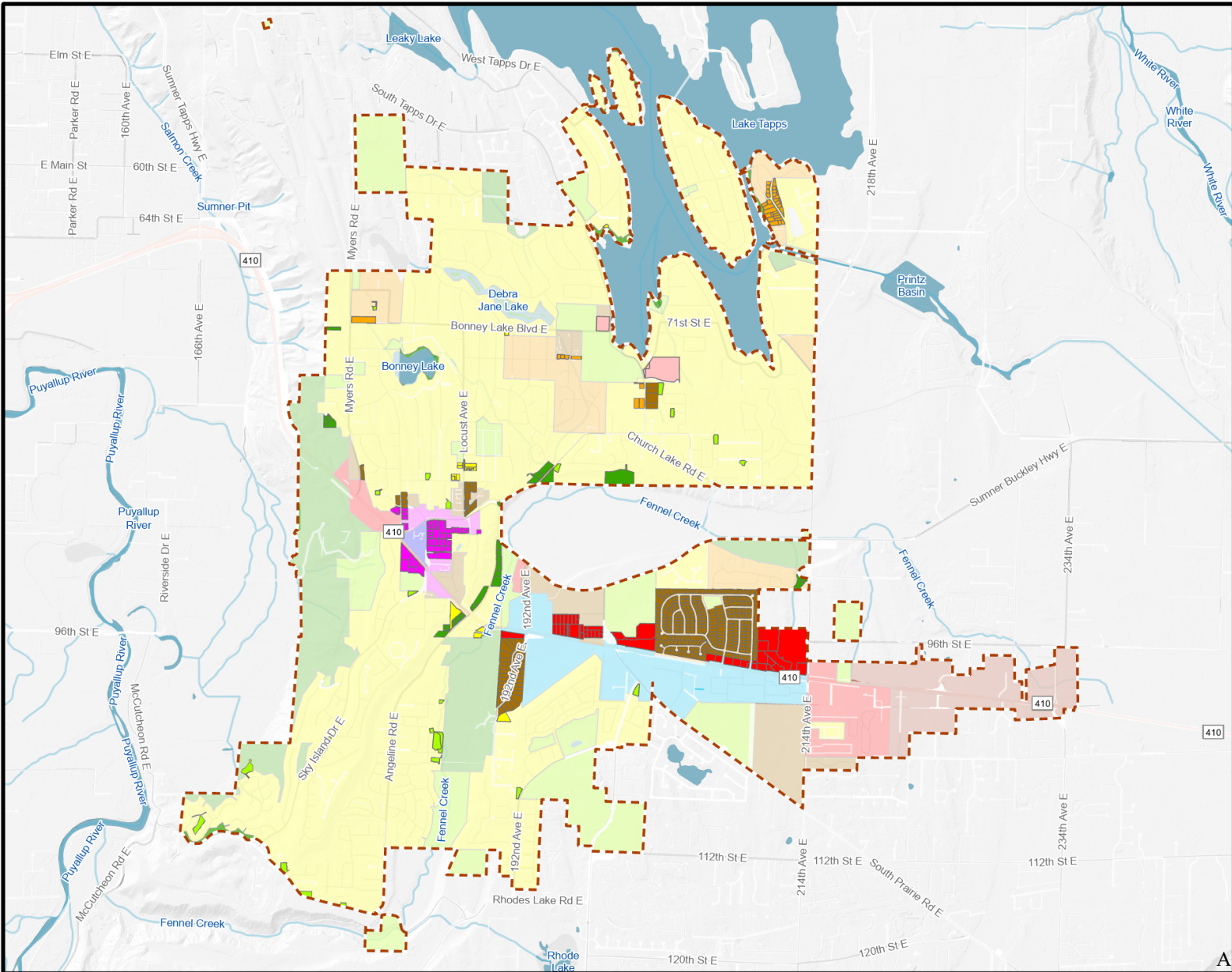
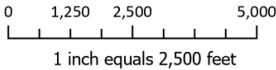
- City Boundary
- Neighborhood Commercial
- Commercial
- Downtown Core District
- Downtown Mixed District
- Eastown
- Midtown Core
- Public Facilities
- Residential
- Medium-Density Residential
- High-Density Residential
- Residential/Conservation District

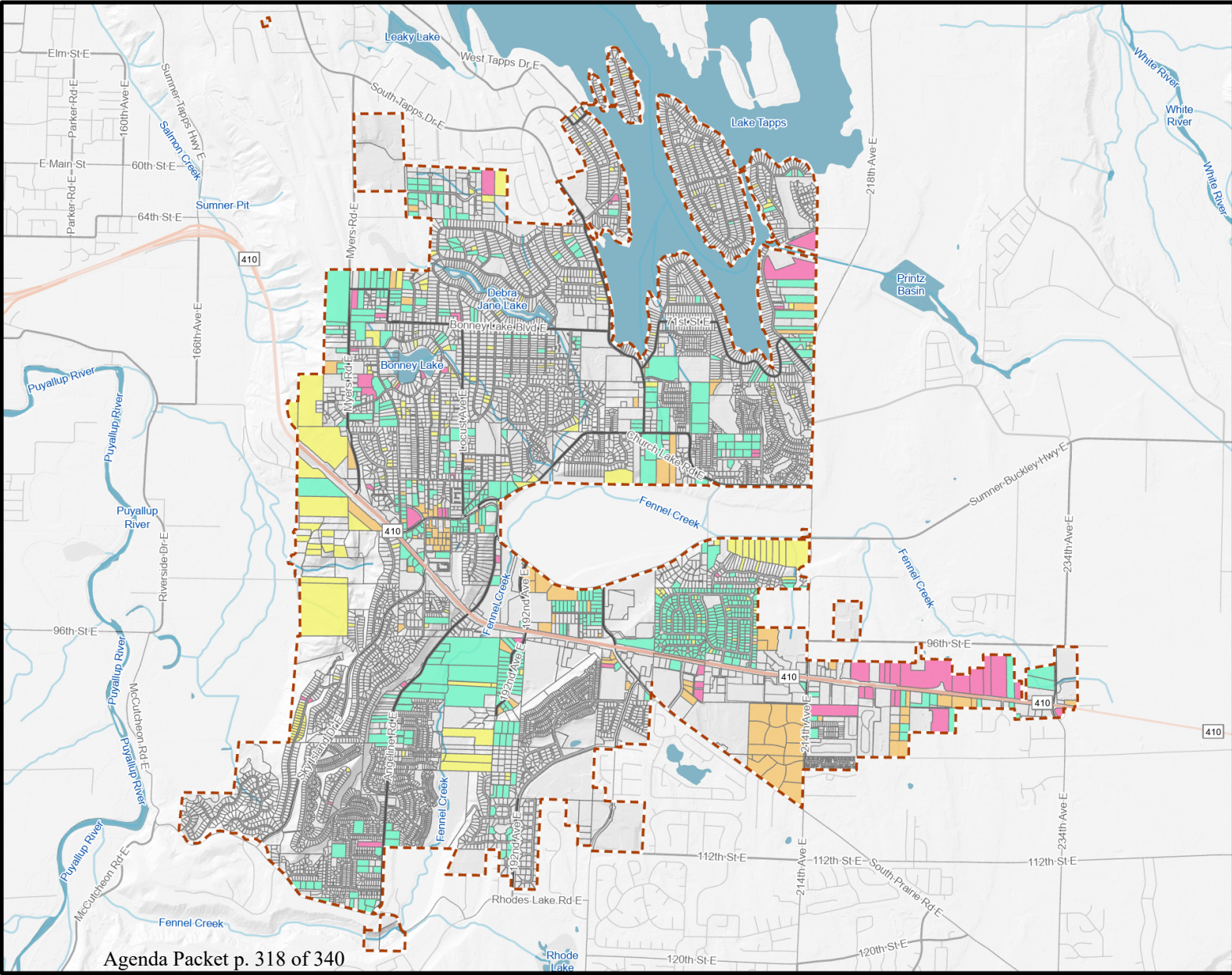
Parcels not subject to rezone in Alternative One are depicted faded.



This map is a geographic representation based on information available at the time of production. Bonney Lake disclaims any warranty concerning the accuracy, currency, or completeness of the data depicted.

Base Map Service layers:
 Washington Geological Survey, King County, WA State Parks
 GIS, Esri, TomTom, Garmin, SafeGraph, GeoTechnologies,
 Inc, METI/NASA, USGS, Bureau of Land Management, EPA,
 NPS, US Census Bureau, USDA, USFWS





**Alternative One Buildable
Lands Inventory**

Legend

- City Boundary
- Built Out/
Undevelopable
- Pipeline
- Underutilized
- Vacant
- Vacant Single
Unit



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Washington Geological Survey, King County, WA State Parks
GIS, Esri, TomTom, Garmin, SafeGraph, GeoTechnologies,
Inc, METI/NASA, USGS, Bureau of Land Management, EPA,
NPS, US Census Bureau, USDA, USFWS*



0 1,250 2,500 5,000

1 inch equals 2,500 feet

Date Updated: 3/28/2024

Alternative Two Zoning

Legend

- City Boundary
- Neighborhood Commercial
- Commercial
- Downtown Core District
- Downtown Mixed District
- Eastown
- Midtown Core
- Public Facilities
- Residential
- Medium-Density Residential
- High-Density Residential
- Residential/Conservation District

Parcels not subject to rezone in Alternative Two are depicted faded.

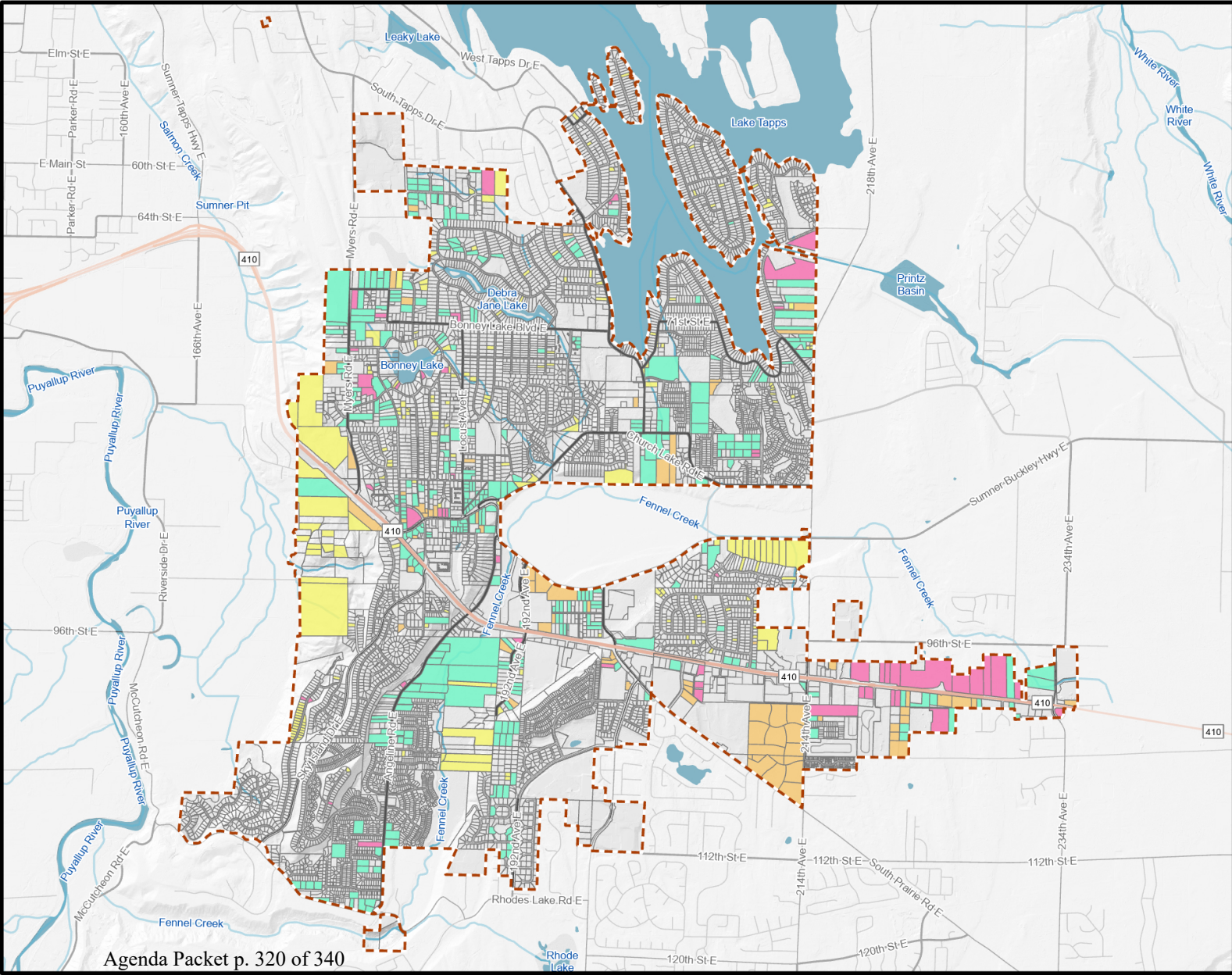


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0 1,250 2,500 5,000
1 inch equals 2,500 feet



**Alternative Two Buildable
Lands Inventory**

Legend

- City Boundary
- Built Out/
Undevelopable
- Pipeline
- Underutilized
- Vacant
- Vacant Single
Unit



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NPS, US Census Bureau, USDA, USFWS*



0 1,250 2,500 5,000

1 inch equals 2,500 feet

Date Updated: 3/28/2024

Chapter 2 Community Development - Comprehensive Plan Goals and Policy Comparison							
2024 Proposed Goals and Policies - Envision Bonney Lake		2015 Existing Goals and Policies - Bonney Lake 2035		Requirement			Notes
Goal/ Policy #	Goal/Policy	Goal/ Policy #	Goal/Policy	MPP	CPP	RCW/WAC	
Goal CD-LU-1	Develop dynamic and vibrant centers accommodating housing, shopping, services, civic activities, entertainment facilities, and recreational opportunities in a manner that harmoniously blends the natural and built environments.	Goal CD-2	Develop dynamic and vibrant centers accommodating housing, shopping, services, civic activities, entertainment facilities, and recreational opportunities in a manner that harmoniously blends the natural and built environments.	Regional Growth Strategies Goal			
CD-LU-1.1	Local centers take a variety of forms. Some may be characterized by predominantly retail uses, while others may contain a more varied mix of activities including commercial, office, residential, parks, community centers, other civic facilities, and education facilities. Bonney Lake will maintain a variety of centers within the City that meet a range of neighborhood, citywide, and regional needs based on the following hierarchy: □ Downtown, which will accommodate pedestrian-oriented retail uses, uses that serve residents and employees, and specialty and “niche” activities such as entertainment, outdoor dining, and civic uses. □ Midtown, which will accommodate a variety uses including high density residential, offices, restaurants, large regional grocery stores, specialty retail stores, and regional shopping centers.	Policy CD-2.1	Local centers take a variety of forms. Some may be characterized by predominantly retail uses, while others may contain a more varied mix of activities including commercial, office, residential, parks, community centers, other civic facilities, and education facilities. Bonney Lake will maintain a variety of centers within the City that meet a range of neighborhood, citywide, and regional needs based on the following hierarchy: □ Downtown, which will accommodate pedestrian-oriented retail uses, uses that serve residents and employees, and specialty and “niche” activities such as entertainment, outdoor dining, and civic uses. □ Midtown, which will accommodate a variety uses including high density residential, offices, restaurants, large regional grocery stores, specialty retail stores, and regional shopping centers. □ Lake Tapps , which will primarily accommodate recreational and residential uses. Smaller shopping centers and local-serving retail and service uses along major thoroughfares would be supported; however, new large-footprint retail uses are inappropriate in such areas.	MPP-RGS-11 MPP-DP-25	C-7 C-24.7 C-15 C-25		Lakes Tapps was removed as a Center.
CD-LU-1.2	Encourage the development of mixed-use, senior housing, high-density residential, and public services uses such as education, health care, libraries, child care, governmental facilities in the centers to create vibrant activity nodes, provide a variety of housing choices, advance sustainable development principles, and support transit.	Policy CD-2.2	Encourage the development of mixed-use, senior housing, high density residential, and public services uses such as education, health care, libraries, child care, governmental facilities in the centers to create vibrant activity nodes, provide housing choices, advance sustainable development principles, support transit, and preserve the City’s existing residential neighborhoods.	MPP-RC-8 MPP-DP-54	C-23 C-40 C-41 EC-3.7 EC-3.8 TR-6.1.1 TR-6.1.2 TR-15		Removed "...and preserve the City's existing residential neighborhoods."
CD-LU-1.3	In selecting which transportation or infrastructure projects to be funded by the City, the City should give priority to the City’s Centers.	Policy CD-2.3	In selecting which transportation or infrastructure projects to be funded by the City, the City should give priority to the City’s Centers.	MPP-RC-8	C-23 C-40 C-41 EC-3.7 EC-3.8 TR-6.1.1 TR-6.1.2		
CD-LU-1.4	Support the transformation of auto-oriented shopping centers—currently characterized by retail strips surrounded by large surface parking lots—into more pedestrian-oriented centers to generate foot traffic, create a stronger sense of place, and bring life to outdoor spaces.	Policy CD-2.4	Support the transformation of auto-oriented shopping centers—currently characterized by retail strips surrounded by large surface parking lots—into more pedestrian-oriented centers to generate foot traffic, create a stronger sense of place, and bring life to outdoor spaces.	MPP-RC-8	C-23 C-40 C-41 EC-3.7 EC-3.8 TR-6.1.1 TR-6.1.2	RCW 36.70A.070(1)	
CD-LU-1.5	Encourage the use of shared parking in commercial districts, rather than independent parking lots on each commercial property in order to reduce the total land area dedicated to parking and create a more pedestrian-friendly environment.	Policy CD-2.5	Encourage the use of shared parking in commercial districts, rather than independent parking lots on each commercial property in order to reduce the total land area dedicated to parking and create a more pedestrian-friendly environment.	MPP-RC-8	C-23 C-40 C-41 EC-3.7 EC-3.8 TR-6.1.1 TR-6.1.2		
CD-LU-1.6	Develop the Downtown as Bonney Lake’s center with the highest level of land use diversity, architectural interest, pedestrian orientation, and human-scale design. New buildings should have their facades at the sidewalk edge except in certain cases along SR-410, as shown in the Centers Plan.	Policy CD-2.6	Develop the Downtown as Bonney Lake’s center with the highest level of land use diversity, architectural interest, pedestrian orientation, and human-scale design. New buildings should have their facades at the sidewalk edge except in certain cases along SR-410, as shown in the Downtown Center Plan.	MPP-RGS-11	C-7 C-24.7 C-15 C-25	RCW 36.70A.070(1)	

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CD-LU-1.7	Develop the Midtown Center as a mixed-use district with the highest possible level of architectural interest, pedestrian orientation, and human-scale design consistent with the facts that 1) much of it is already built and 2) pedestrian traffic alongside and across the highway will suffer due to high vehicular traffic. Wherever possible, developments should reach deeply into the adjoining commercial land, provide local access streets as dictated by the Mobility Element, and place their building facades at the edge of the sidewalk adjoining said local access streets.	Policy CD-2.7	Develop the Midtown Center as a mixed-use district with the highest possible level of architectural interest, pedestrian orientation, and human-scale design consistent with the facts that 1) much of it is already built and 2) pedestrian traffic alongside and across the highway will suffer due to high vehicular traffic. Wherever possible, developments should reach deeply into the adjoining commercial land, provide local access streets as dictated by the Mobility Element, and place their building facades at the edge of the sidewalk adjoining said local access streets.	MPP-RGS-11	C-7 C-24.7 C-15 C-25	RCW 36.70A.070(1)	
Goal CD-LU-2	Develop Eastown as a light-industrial area to increase the number and diversity of jobs available to the citizens of Bonney Lake and to diversify the City's tax base.	Goal CD-3	Develop Eastown as a light-industrial area to increase the number and diversity of jobs available to the citizens of Bonney Lake and to diversify the City's tax base.	MPP-RGS-4	EC-2 - EC-2.12 ENV-10.7 RUR-2 UGA-7 - UGA-7.3		
CD-LU-2.1	Develop Eastown with 1) architectural detail suitable for automobile orientation along SR-410, 2) internal and, if possible external pedestrian connections, and 3) preference for business park or campus-scale development.	Policy CD-3.1	Develop Eastown with 1) architectural detail suitable for automobile orientation along SR-410, 2) internal and, if possible external pedestrian connections, and 3) preference for business park or campus-scale development.	MPP-DP-50 MPP-EC-9	EC-1.8 EC-2.1 EC-2.6 EC-4.9		
CD-LU-2.2	Encourage parcel consolidation to provide infill sites for redevelopment and expansion opportunities.	Policy CD-3.2	Encourage parcel consolidation to provide infill sites for redevelopment and expansion opportunities.	MPP-RGS-4	EC-2 - EC-2.12 ENV-10.7 RUR-2 UGA-7 - UGA-7.3		
CD-LU-2.3	Encourage best management practices for site planning and design related to, but not limited to, building placement and orientation, vehicular and pedestrian circulation patterns, open space, landscaping, lighting, stormwater management, interfacing with adjacent neighborhoods and developments, and appropriate accommodation of the site's natural features.	Policy CD-3.3	Encourage best management practices for site planning and design related to, but not limited to, building placement and orientation, vehicular and pedestrian circulation patterns, open space, landscaping, lighting, stormwater management, interfacing with adjacent neighborhoods and developments, and appropriate accommodation of the site's natural features.	MPP-EC-16	EC-1.7		
CD-LU-2.4	Improve services to the area to support redevelopment opportunities primarily the development of sanitary sewer.	Policy CD-3.4	Improve services to the area to support redevelopment opportunities primarily the development of sanitary sewer.	MPP-RGS-4	EC-2 - EC-2.12 ENV-10.7 RUR-2 UGA-7 - UGA-7.3		
Goal CD-LU-3	Provide healthy, livable, well maintained, walkable, and safe residential neighborhoods that provide opportunities for social interaction in a manner that harmoniously blends the natural and built environments.	Goal CD-4	Provide healthy, livable, well maintained, walkable, and safe residential neighborhoods that provide opportunities for social interaction in a manner that harmoniously blends the natural and built environments.	Development Patterns Goal MPP-PS-26		RCW 36.70A.070(1)	
CD-LU-3.1	Planning and land use decisions should recognize residents as the foundation of the community, by promoting compatibility between existing and new housing units, protecting residential uses from adverse impacts and uses, and maintaining a range of residential zones to support the identified housing needs.	Policy CD-4.1	Planning and land use decisions should recognize residential neighborhoods as the basic "building blocks" of the community, ensure compatibility with existing detached homes, protect neighborhoods from incompatible uses, and maintain a range of residential zones corresponding to the prevailing neighborhood densities.	MPP-DP-16 MPP-DP-26		RCW 36.70A.070(1)	
CD-LU-3.2	Allow home occupations in Bonney Lake's residences when all applicable regulations can be satisfied.	Policy CD-4.2	Allow home occupations in Bonney Lake's residences, if impacts are mitigated and the business does not alter the residential character of the neighborhood.			RCW 36.70A.070(1)	

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		Policy CD-4.3	Allow schools, day care centers, senior centers, group homes, public and semi-public facilities (e.g., churches), and nursing care facilities in residential areas, subject to conditions which limit the impacts of these uses on nearby properties. To the extent permitted by state and federal law, conditions of approval may be placed on such uses to ensure that they are operated in a manner that is sensitive to neighborhood concerns, and that maintains residents' quality of life. In addition, such uses should be sited in a way that minimizes the exposure of future occupants to noise, localized air pollution sources, and other environmental hazards.	Not applicable.	Not applicable.	Not applicable.	Policy was removed.
CD-LU-3.3	Support healthy and safe neighborhoods by developing and implementing programs to address nuisances and environmental hazards (e.g. excessive noise, poor air quality, light pollution, illegal dumping, illegal signage, graffiti, littering, etc.).	Policy CD-4.3	Provide healthy and safe neighborhoods free of nuisances, environmental hazards, and visual blight (e.g. excessive noise, poor air quality, light pollution, illegal dumping, illegal signage, graffiti, littering, etc.) that disrupt and impact Bonney Lake residents' quality of life.	MPP-RC-3 MPP-EN-3	H-3 TR-9 EPF-6.10		Language updated.
CD-LU-3.4	Conserve and protect the unique ecological characteristics of the City and utilize urban forestry to integrate open space, parks, green belts, street trees, landscaping, and natural features into future development in order to maintain Bonney Lake's livability, improve access to nature, and to address climate change by utilizing trees to sequester carbon from the atmosphere.	Policy CD-4.4	Conserve and protect the unique ecological characteristics of the City and utilize urban forestry to integrate open space, parks, green belts, street trees, landscaping, and natural features into future development in order to maintain Bonney Lake's livability, improve access to nature, and to address climate change by utilizing trees to sequester carbon from the atmosphere.	MPP-EN-9 MPP-EN-11 MPP-EN-12 MPP-EN-13 EN-ACTION-4	ENV-11 ENV-12 ENV-13 ENV-15 ENV-16.8 ENV-17 ENV-22.3 ENV-23.3 ENV-44.2		
CD-LU-3.5	Utilize capital improvement projects, design guidelines, and land use decisions to improve the walkability of neighborhoods, enhance the ability to travel by bicycle or public transportation, and minimize the distance a resident must travel to reach basic services, shopping, parks, schools, and other civic amenities.	Policy CD-4.5	Utilize capital improvement projects, design guidelines, and land use decisions to improve the walkability of neighborhoods, enhance the ability to travel by bicycle or public transportation, and minimize the distance a resident must travel to reach basic services, shopping, parks, schools, and other civic amenities.			RCW 36.70A.070(1)	
CD-LU-3.6	Create standards for clustering developments that conserves natural features and which minimizes the impact of development in environmentally sensitive areas.	Policy CD-4.6	Create standards for clustering developments that conserves natural features and which minimizes the impact of development in environmentally sensitive areas.	MPP-EN-12 EN-ACTION-4	ENV-11 ENV-12 ENV-13 ENV-15 ENV-17		
CD-LU-3.7	Encourage subdivision designs in which residential lots are oriented towards, and take access from, the neighborhood of which they are a part.	Policy CD-4.7	Encourage subdivision designs in which residential lots are oriented towards, and take access from, the neighborhood of which they are a part.	EN-ACTION-4	ENV-11 ENV-12 ENV-13 ENV-15 ENV-17		
CD-LU-3.8	Residential developments should be sited so individual residential dwelling does not take direct driveway access from an arterial.	Policy CD-4.8	Residential developments should be sited so individual residential dwelling does not take direct driveway access from an arterial.	MPP-EN-3 MPP-T-15	ENV-38 ENV-39 TR-1 TR-6.1 TR-9 TR-11 EPF-6.10 H-3		
Goal CD-LU-4	Provide streets, sidewalks, parks, plazas, civic buildings, and other public spaces that contribute to Bonney Lake's sense of place and visual quality.	Goal CD-6	Provide streets, sidewalks, parks, plazas, civic buildings, and other public spaces that contribute to Bonney Lake's sense of place and visual quality.	Development Patterns Goal			
CD-LU-4.1	Recognize the importance of streets as public space: Landscaping, lighting, streetscape elements, pavement changes, signage improvements, banners, and other public realm improvements can enhance the experience of traveling along a corridor without diminishing its functional capacity.	Policy CD-6.1	Recognize the importance of streets as public space: Landscaping, lighting, streetscape elements, pavement changes, signage improvements, banners, and other public realm improvements can enhance the experience of traveling along a corridor without diminishing its functional capacity	MPP-DP-3 MPP-DP-10 MPP-DP-11	TR-5 CU-2		

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CD-LU-4.2	Improvements to corridors should be appropriate to the scale and character of each street, reflecting their traffic volumes and intended functions.	Policy CD-6.2	Improvements to corridors should be appropriate to the scale and character of each street, reflecting their traffic volumes and intended functions.	MPP-DP-12 MPP-DP-53 MPP-T-5 MPP-T-7 MPP-T-12 MPP-T-16 MPP-T-17	TR-1 TR-5 TR-6 TR-6.1.1 TR-6.1.2 TR-9 TR-11 TR-14 TR-15		
CD-LU-4.3	Design guidelines, design review requirements, engineering standards, and capital improvement projects should aim to improve the visual quality of street space.	Policy CD-6.3	Design guidelines, design review requirements, engineering standards, and capital improvement projects should aim to improve the visual quality of street space.	MPP-DP-6	HAC-3		
CD-LU-4.4	Use street furniture (e.g. benches, trash cans, kiosks, bicycle lockers, bus shelters, etc.) to improve the pedestrian experience, create stronger identity and visual cohesion, and contribute to the desired character of an area.	Policy CD-6.4	Use street furniture (e.g. benches, trash cans, kiosks, bicycle lockers, bus shelters, etc.) to improve the pedestrian experience, create stronger identity and visual cohesion, and contribute to the desired character of an area.	MPP-RC-8 MPP-RGS-11 MPP-EN-21	C-7 C-15 C-23 C-24.7 C-25 C-40 C-41 EC-3.7 EC-3.8 TR-6.1.1 TR-6.1.2 TR-9 ENV-39	RCW 36.70A.070(1)	
CD-LU-4.5	Encourage the development of public gathering spaces within new developments that are responsive to a project's scale and expected level of activity, and respectful of surrounding land uses.	Policy CD-6.5	Encourage the development of public gathering spaces within new developments that are responsive to a project's scale and expected level of activity, and respectful of surrounding land uses.	MPP-DP-1 MPP-T-16	TR-5 TR-9.5 ENV-39.5 UGA-7		
CD-LU-4.6	Encourage plazas, pocket parks, and similar spaces to stimulate pedestrian activity, provide community-gathering places, and complement the overall appearance and form of adjoining buildings.	Policy CD-6.6	Encourage plazas, pocket parks, and similar spaces to stimulate pedestrian activity, provide community-gathering places, and complement the overall appearance and form of adjoining buildings.	MPP-RGS-6	C-7 C-24.7 UGA-6.2 UGA-7.2 EC-1.1 ENV-10.7	RCW 36.70A.070(1)	
CD-LU-4.7	While the design of each public space must be sensitive to its context, all public spaces should share several common design characteristics. These include: ☐ Locations in prominent, recognizable and accessible locations where they are likely to receive frequent use and be highly visible. ☐ Seating areas, signage, pedestrian amenities, activity areas and other design features that increase usability and functionality. ☐ A unique identity that enables the space to function independently, while still allowing the space to work in connection with adjacent development. ☐ Accommodation of a variety of users (i.e. arts, cultural, recreational, different ages, abilities, etc.). ☐ Variations in landscaping, pavement, lighting, public art, and other amenities which improve the quality of each space and define its character. ☐ Protection from wind, sun, and noise exposure. ☐ Spaces that utilize a mixture of direct sunlight and shade.	Policy CD-6.7	While the design of each public space must be sensitive to its context, all public spaces should share several common design characteristics. These include: ☐ Locations in prominent, recognizable and accessible locations where they are likely to receive frequent use and be highly visible. ☐ Seating areas, signage, pedestrian amenities, activity areas and other design features that increase usability and functionality. ☐ A unique identity that enables the space to function independently, while still allowing the space to work in connection with adjacent development. ☐ Accommodation of a variety of users (i.e. arts, cultural, recreational, different ages, abilities, etc.). ☐ Variations in landscaping, pavement, lighting, public art, and other amenities which improve the quality of each space and define its character. ☐ Protection from wind, sun, and noise exposure. ☐ Spaces that utilize a mixture of direct sunlight and shade.	MPP-DP-3 MPP-DP-10 MPP-DP-11	TR-5 CU-2	RCW 36.70A.070(1)	
CD-LU-4.8	Develop key "multi-modal" corridors that accommodate multiple modes of transportation that connect Bonney Lake's neighborhoods and centers, enhance the City's civic identity, encourage transit use, reduce vehicle miles traveled, provide comfortable walking and bicycling environments, and project a positive image of the city.	Policy CD-6.8	Develop key "multi-modal" corridors that accommodate multiple modes of transportation that connect Bonney Lake's neighborhoods and centers, enhance the City's civic identity, encourage transit use, reduce vehicle miles traveled, provide comfortable walking and bicycling environments, and project a positive image of the city.	MPP-RC-3 MPP-EN-21	H-3 ENV-39 TR-9	RCW 36.70A.070(1)	
Goal CD-LU-5	Improve gateways into Bonney Lake and into its individual neighborhoods and districts to achieve a sense of transition and arrival.	Goal CD-8	Improve gateways into Bonney Lake and into its individual neighborhoods and districts to achieve a sense of transition and arrival.				City Preference

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CD-LU-5.1	Develop gateway standards which provide guidance for the design and appearance of primary and secondary gateways into Bonney Lake.	Policy CD-8.1	Develop a Gateway Plan, which provides guidance for the design and appearance of primary and secondary gateways into Bonney Lake.				City Preference
CD-LU-5.2	Private development located within gateway areas should incorporate public improvements that enhance the identity and image of the City.	Policy CD-8.2	Private development located within gateway areas should incorporate public improvements that enhance the identity and image of the City.				City Preference
CD-LU-5.3	Require new development projects to provide gateway features, if their location and context warrant such inclusion.	Policy CD-8.3	Require new development projects to provide gateway features, if their location and context warrant such inclusion.				City Preference
Goal CD-LU-6	Guide growth and development to ensure that it is orderly and efficient; leverage public investment to address the needs of the underserved areas; ensure the continued availability of infrastructure and public services; reduce adverse impacts on adjacent properties; and to protect the natural environment.	Goal CD-9	Guide growth and development to ensure that it is orderly and efficient; leverage public investment to address the needs of the underserved areas; ensure the continued availability of infrastructure and public services; reduce adverse impacts on adjacent properties; and to protect the natural environment.	Development Patterns Goal			
CD-LU-6.1	Ensure that land use decisions consider the characteristics of the transportation network, including road capacity, the quality of the streetscape, and the availability of public transportation and other modes of travel.	Policy CD-9.1	Ensure that land use decisions consider the characteristics of the transportation network, including road capacity, the quality of the streetscape, and the availability of public transportation and other modes of travel.	MPP-DP-1 MPP-DP-14 MPP-DP-52 MPP-DP-53 DP-ACTION-8	ENV-39.5 TR-9.5 TR-14 TR-15 UGA-7 C-7 C-8 C-9 C-10 C-11 C-12 C-13 C-15 C-16 C-17 C-37 C-45		
CD-LU-6.2	Adopt and routinely update development regulations to direct growth, ensure sufficient opportunities for new development, maintain and improve Bonney Lake's quality of life, preserve and rehabilitate existing housing stock, mitigate nuisances, achieve compatibility between adjacent properties and uses, and protect the health, safety and welfare of residents, workers, and visitors.	Policy CD-9.2	Use development regulations to direct growth, ensure sufficient opportunities for new development, improve Bonney Lake's quality of life, preserve existing neighborhoods, reduce nuisances, achieve compatibility between adjacent properties and uses, address land use conflicts, and protect the health and safety of residents, visitors, and workers.	MPP-RC-3 MPP-RGS-1	H-3 Draft CPPs Intro		
CD-LU-6.3	Utilize urban design guidelines to guide and evaluate remodeling projects, additions, and new construction. Guidelines should: ☐ Address building height, scale, massing, materials, colors, and detailing; ☐ Ensure pedestrian connections; ☐ Encourage interesting features such as varied roof forms, canopies, balconies, window displays, bay windows, vertically and horizontally modulated wall surfaces, trellises with native vines, porches, artwork, planting beds, ornamental trim, modulations and varied textures, colors, and materials; and ☐ Ensure that sites are designed in context and relationship to surrounding uses and landscapes.	Policy CD-9.3	Utilize urban design guidelines to guide and evaluate remodeling projects, additions, and new construction. Guidelines should: ☐ Address building height, scale, massing, materials, colors, and detailing; ☐ Ensure pedestrian connections; ☐ Encourage interesting features such as varied roof forms, canopies, balconies, window displays, bay windows, vertically and horizontally modulated wall surfaces, trellises with native vines, porches, artwork, planting beds, ornamental trim, modulations and varied textures, colors, and materials; and ☐ Ensure that sites are designed in context and relationship to surrounding uses and landscapes.	MPP-RGS-6	C-7 C-24.7 UGA-6.2 UGA-7.2 EC-1.1 ENV-10.7	RCW 36.70A.070(1)	

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CD-LU-6.4	Recognize certain areas as having natural constraints that preclude safe or environmentally sound development. These constraints are discussed further in the Environmental Stewardship Element.	Policy CD-9.4	Recognize certain areas as having natural constraints that preclude safe or environmentally sound development. These constraints are discussed in the Environmental Stewardship Element.	MPP-EN-1 MPP-EN-4 MPP-EN-11 MPP-EN-14 MPP-EN-16	ENV-1 ENV-3 - ENV-3.1 ENV-4 ENV-5.4 ENV-16 ENV-17 ENV-20 ENV-21 ENV-21.9 ENV-22 ENV-23 ENV-25 ENV-36 ENV-39.2 ENV-40 ENV-42 EPF-6.10 H-3		
CD-LU-6.5	Allow new development to occur only when the public facilities needed to serve that development are available, or when provided for by the development through the payment of impact fees, in-lieu fees, or connection charge; construction of the facility as part of the development; or other mitigation measures.	Policy CD-9.5	Allow new development to occur only when the public facilities needed to serve that development are available, or when provided for by the development through the payment of impact fees, in-lieu fees, or connection charge; construction of the facility as part of the development; or other mitigation measures.	MPP-DP-52 MPP-PS-3 MPP-PS-4	TR-11 TR-14 TR-15 TR-16 TR-17 TR-18 C-13 UGA-13.4.1 UGA-13.5.2		
CD-LU-6.6	Although the Comprehensive Plan provides for development capacity to accommodate growth through the planning period, steps should be taken to retain some of this capacity for after the planning period and guide development towards the Downtown and Midtown Centers.	Policy CD-9.6	Although the Comprehensive Plan provides for development capacity to accommodate growth until 2035, steps should be taken to retain some of this capacity for the post-2035 period and guide development towards the Downtown, Midtown, and Lake Tapps Centers.	MPP-RGS-4 MPP-RGS-6 MPP-RGS-11	EC-2 - EC-2.12 ENV-10.7 RUR-2 UGA-7 - UGA-7.3 C-7 C-15 C-24.7 C-25 UGA-6.2 UGA-7.2 EC-1.1 ENV-10.7		"...and Lake Tapps" was removed.
CD-LU-6.7	Avoid the creation of "problem" parcels that are not practical to develop, access, or to provide with services. Work to eliminate or merge such parcels where they already exist.	Policy CD-9.7	Avoid the creation of "problem" parcels that are not practical to develop or provide with services. Work to eliminate or merge such parcels where they already exist. A problem parcel is defined as: ☐ Any parcel which, regardless of the minimum area or dimension requirements set forth in the Zoning Ordinance, is not practically developable because of its unusual dimensions, shape, or location relative to other parcels; or ☐ Any parcel which has other land use constraints, such as environmentally critical areas; or ☐ Any parcel with no street access or insufficient street frontage to provide access.		EPF-6.11		Definition of a "problem parcel" was removed.
CD-LU-6.8	Encourage partnerships between the City and the private sector to undertake joint public-private development.	Policy CD-9.8	Encourage partnerships between the City and the private sector to undertake joint public-private development.	MPP-RC-2	AH-7 EC-2.7 ENV-12.2 TR-6.4.2 AH-3 AH-4 TR-4 TR-4.3 TR-4.4 TR-4.1.1		

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CD-LU-6.9	Integrate new large-scale development projects into the fabric of the existing community rather than allowing such projects to be self-contained, walled off or physically divided from surrounding uses. New development should be viewed as an opportunity to improve connectivity between neighborhoods. To the extent feasible, circulation systems and open spaces in such developments should tie into existing streets and open spaces on the perimeter. In addition, existing development should be retrofitted over time to reduce unnecessary walls and barriers and improve pedestrian connections between neighborhoods.	Policy CD-9.9	Integrate new large-scale development projects into the fabric of the existing community rather than allowing such projects to be self-contained, walled off or physically divided from surrounding uses. New development should be viewed as an opportunity to improve connectivity between neighborhoods. To the extent feasible, circulation systems and open spaces in such developments should tie into existing streets and open spaces on the perimeter. In addition, existing development should be retrofitted over time to reduce unnecessary walls and barriers and improve pedestrian connections between neighborhoods.	MPP-DP-3	TR-5		
CD-LU-6.10	Establish development regulations that facilitate the development of a positive regional identity for Bonney Lake as a City with outstanding neighborhoods and vibrant centers that provide gathering places for residents and visitors.	Policy CD-9.10	Establish development regulations that facilitate the development of a positive regional identity for Bonney Lake as a City with outstanding neighborhoods and vibrant centers that provide gathering places for residents and visitors.	MPP-DP-1 MPP-DP-5 MPP-DP-6	ENV-39.5 TR-9.5 UGA-7 HAC-3		
CD-LU-6.11	Redevelop Bonney Lake's under-developed or vacant sites in a manner that balances providing an array of housing, jobs, retail, recreational, and entertainment opportunities, with the need to respect the planned scale and form of surrounding properties and neighborhoods.	Policy CD-9.11	Redevelop Bonney Lake's under-developed or vacant sites in a manner that balances providing an array of housing, jobs, retail, recreational, and entertainment opportunities, with the need to respect the scale and form of surrounding properties and neighborhoods.	MPP-RGS-4	EC-2 - EC-2.12 ENV-10.7 RUR-2 UGA-7 - UGA-7.3		
CD-LU-6.12	Allow for the siting of Essential Public Facilities as required by State law.			MPP-RC-1 MPP-EN-3 MPP-EN-7 RGS-ACTION-7 MPP-RGS-2 MPP-RGS-16	ED-3 TR-3 EC-1 UGA-11 RUR-12		Added to comply with XXXX.
Goal CD-LU-7	Preserve open space, parks, greenbelts, and natural areas, which together protect the Bonney Lake's natural resources, provide opportunities for recreation, enhance visual beauty, and shape Bonney Lake's character.	Goal CD-5	Preserve open space, parks, greenbelts, and natural areas, which together protect the Bonney Lake's natural resources, provide opportunities for recreation, enhance visual beauty, and shape Bonney Lake's character	Environment Goal	ENV-3 - ENV-3.1 ENV-12 ENV-13 ENV-21 ENV-22 ENV-30 - ENV-30.2 ENV-34 ENV-36 ENV-43.4 RUR-9	RCW 36.70A.070(1)	
CD-LU-7.1	Maintain development regulations which distinguish between different types of open space, based on the different types of activities that take place on undeveloped land.	Policy CD-5.1	Maintain development regulations which distinguish between different types of open space, in recognition of the different types of activities that take place on undeveloped land.	MPP-EN-5 MPP-EN-11 MPP-EN-12 MPP-EN-14	ENV-3 - ENV-3.1 ENV-12 ENV-13 ENV-21 ENV-22 ENV-30 - ENV-30.2 ENV-34 ENV-36 ENV-43.4 RUR-9		
CD-LU-7.2	Maintain and enhance a network of neighborhood, community, and linear parks. Parks should be recognized as fundamental to Bonney Lake's quality of life, and should be carefully managed to create a balance between passive and active open space.	Policy CD-5.2	Maintain and enhance a network of neighborhood, community, and linear parks. Parks should be recognized as fundamental to Bonney Lake's quality of life, and should be carefully managed to create a balance between passive and active open space.	MPP-EN-15	ENV-12 UGA-12		
CD-LU-7.3	Utilize open space, including parks, greenbelts, easements, and other open areas to connect the City, provide car-free corridors for pedestrians and bicyclists, and tie together Bonney Lake's neighborhoods, centers, and employment districts.	Policy CD-5.3	Utilize open space, including parks, greenbelts, easements, and other open areas to connect the City, provide car-free corridors for pedestrians and bicyclists, and tie together Bonney Lake's neighborhoods, centers, and employment districts.	EN-ACTION-4	ENV-11 ENV-12 ENV-13 ENV-15 ENV-17	RCW 36.70A.070(1)	
CD-LU-7.4	Encourage private-public partnerships to create on-site open space for public enjoyment in mixed-use areas and commercial areas.	Policy CD-5.4	Encourage private-public partnerships to create on-site open space for public enjoyment in mixed-use areas and commercial areas.	MPP-RC-11	AH-4 TR-19 TR-22		

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Goal/ Policy #	Goal/Policy	Goal/ Policy #	Goal/Policy	MPP	CPP	RCW/WAC	
CD-LU-7.5	Allow community gardening and “urban” agriculture in residentially-zoned areas and open spaces, provided that these uses do not impact the functions and values of environmentally critical areas.	Policy CD-5.5	Allow community gardening and “urban” agriculture in residentially-zoned areas and open spaces, provided that these uses do not impact the functions and values of environmentally critical areas.	MPP-EN-4 MPP-EN-15	ENV-12 ENV-40 EPF-6.10 H-3 UGA-12		
CD-LU-7.6	Allow recreational uses on lands designated as environmentally critical areas, provided that these uses do not impact the function and values of environmentally critical areas.	Policy CD-5.6	Allow recreational uses on lands designated as environmentally critical areas, provided that these uses do not impact the function and values of environmentally critical areas.	MPP-EN-12 MPP-EN-15	ENV-12 ENV-13 UGA-12	RCW 36.70A.070(1)	
CD-LU-7.7	Establish zoning standards to mitigate for the presence of infrastructure facilities such as radio and telecommunication towers within designated open space areas.	Policy CD-5.7	Establish zoning standards to mitigate for the presence of infrastructure facilities such as radio and telecommunication towers within designated open space areas.	MPP-EN-3 MPP-EN-4	TR-9 EPF-6.10 H-3 ENV-12 ENV-40		
CD-LU-7.8	Prevent the encroachment or conversion of common open space areas within planned developments or other residential projects. Shared open space areas in residential subdivisions shall be permanently restricted to open space uses through deed restrictions or other appropriate means.	Policy CD-5.8	Prevent the encroachment or conversion of common open space areas within planned developments or other residential projects. Shared open space areas in residential subdivisions shall be permanently restricted to open space uses through deed restrictions or other appropriate means.	MPP-EN-1	ENV-1 ENV-4 ENV-5.4 ENV-17 ENV-20 ENV-21.9 ENV-23 ENV-25 ENV-16 ENV-36 ENV-39.2 ENV-40 ENV-42		
CD-LU-7.9	Advocate for open space conservation and resource protection in the unincorporated areas east of the Bonney Lake’s city limits but within the City’s sphere of influence. These areas should remain in agricultural and open space uses for the lifetime of this Comprehensive Plan.	Policy CD-5.9	Advocate for open space conservation and resource protection in the unincorporated areas east of the Bonney Lake’s city limits but within the City’s sphere of influence. These areas should remain in agricultural and open space uses for the lifetime of this Comprehensive Plan.	MPP-RGS-4 MPP-RGS-15 RGS-ACTION-7 MPP-EN-1 MPP-EN-4	EC-2 - EC-2.12 RUR-2 RUR-3 RUR-4 RUR-5 RUR-11 RUR-12 TR-6.2 - TR-6.2.1 UGA-7 - UGA-7.3 ENV-1 ENV-4 ENV-5.4 ENV-10.7 ENV-12 ENV-17 ENV-18 ENV-20 ENV-21.9 ENV-23 ENV-25 ENV-16 ENV-36 ENV-39.2 ENV-40		
CD-LU-7.10	Preserve historic and cultural resources as assets for the future, in consultation with local, Federally-recognized tribes.			MPP-RC-4	HAC-1 TR-4.6		Added to address the policy gap.
Goal CD-LU-8	Protect and enhance Bonney Lake’s scenic, natural, and visual character.	Goal CD-7	Protect and enhance Bonney Lake’s scenic, natural, and visual character.	Environment Goal			
CD-LU-8.1	Preserve views through sensitive site design, especially along scenic corridors. Prevent new development from blocking important public views.	Policy CD-7.1	Preserve views through sensitive site design, especially along scenic corridors. Prevent new development from blocking important public views.	MPP-DP-6	HAC-3		

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Goal/ Policy #	Goal/Policy	Goal/ Policy #	Goal/Policy	MPP	CPP	RCW/WAC	
CD-LU-8.2	Maintain a network of designated scenic routes through Bonney Lake. A particular road or corridor may be considered scenic by virtue of its design or amenities, the terrain and natural features it traverses, or the views and visual importance it commands. The designation expresses an intent to maintain or improve visual features, which protects public views through land use, transportation, and capital improvement decisions, as well as landscaping, operations, and maintenance activities along these corridors, but does not necessarily limit abutting uses.	Policy CD-7.2	Maintain a network of designated scenic routes through Bonney Lake. A particular road or corridor may be considered scenic by virtue of its design or amenities, the terrain and natural features it traverses, or the views and visual importance it commands. The designation expresses an intent to maintain or improve visual features, which protects public views through land use, transportation, and capital improvement decisions, as well as landscaping, operations, and maintenance activities along these corridors, but does not necessarily limit abutting uses.	MPP-DP-6	HAC-3		
CD-LU-8.3	Acquire lands or view easements if necessary to preserve important public views.	Policy CD-7.3	Acquire lands or view easements if necessary to preserve important public views.	MPP-DP-6	HAC-3		
CD-LU-8.4	Encourage developers to retain mature trees to the extent possible, particularly in residential areas.	Policy CD-7.4	Encourage developers to retain mature trees to the extent possible, particularly in residential areas.	MPP-DP-6	HAC-3		
CD-LU-8.5	Reduce the visual impacts of utility lines and poles along corridors by continuing to underground overhead lines within existing development, and by requiring underground utilities in new developments.	Policy CD-7.5	Reduce the visual impacts of utility lines and poles along corridors by continuing to underground overhead lines within existing development, and by requiring underground utilities in new developments.	MPP-DP-6	HAC-3		
CD-LU-8.6	On the south side of SR-410 near the western city limits, tree cutting shall not extend so far from SR-410 as to remove the solid backdrop of mature trees as viewed horizontally from SR-410.	Policy CD-7.6	On the south side of SR-410 near the western city limits, tree cutting shall not extend so far from SR-410 as to remove the solid backdrop of mature trees as viewed horizontally from SR-410.	MPP-DP-6	HAC-3		
Goal CD-LU-9	Improve access and opportunities to enhance the health of all Bonney Lake residents while reducing the negative factors that reduce their well-being.			RC-Action-3 MPP-DP-16	H-6		Added to address policy gap.
CD-LU-9.1	Reduce the negative health effects of air, noise and light pollution through regulation and environmental strategies.			RC-Action-3 MPP-DP-16	H-6		Added to address policy gap.
CD-LU-9.2	Improve walkability and promote active, nonmotorized forms of transportation to improve public health and minimize environmental impacts.			RC-Action-3 MPP-DP-15	H-6		Added to address policy gap.
CD-LU-9.3	Increase access to healthy food for all Bonney Lake residents by encouraging and supporting healthy food retail and partnerships with the local food bank.			RC-Action-3 MPP-DP-20	H-6		Added to address policy gap.
Goal CD-LU-10	Ensure that development in the City's potential annexation area is accompanied by adequate urban services and facilities; reduces sprawl; implements the Growth Management Act, Vision 2050's Multi-Countywide Planning Policies for Pierce County and the Bonney Lake Comprehensive Plan.	Goal CD-1	Ensure that development in the City's potential annexation area is accompanied by adequate urban services and facilities; reduces sprawl; implements the Growth Management Act, Vision 2040's Multi-County Planning Policies, Pierce County's Planning Policies, and the Bonney Lake Comprehensive Plan; and protects designated rural areas.	Development Patterns Goal			Removed "...and protects designated rural areas."
CD-LU-10.1	Review proposed annexations for their timeliness, the City's ability to provide them with urban services, and the costs and revenues that the City would likely incur. The City may refuse annexations in which public facilities are below the City's level of service standard.	Policy CD-1.1	Review proposed annexations for their timeliness, the City's ability to provide them with urban services, and the costs and revenues that the City would likely incur. The City may refuse annexations in which public facilities are below the City's level of service standard.	MPP-RGS-16	UGA-4 UGA-5		
CD-LU-10.2	The City shall actively pursue joint planning agreements with Pierce County to ensure that all development within Bonney Lake's PAA is built to mutually agreed upon standards. These agreements should cover a wide range of areas, including, but not limited to, development standards, collection of impact fees, annexations, urban service provision and land use, transportation, parks, and capital facilities planning.	Policy CD-1.2	The City shall actively pursue joint planning agreements with Pierce County to ensure that all development within Bonney Lake's PAA is built to mutually agreed upon standards. These agreements should cover a wide range of areas, including, but not limited to, development standards, collection of impact fees, annexations, urban service provision and land use, transportation, parks and capital facilities planning.	MPP-RC-10 MPP-RGS-16	AH-4 TR-22 UGA-5.3.2.2 UGA-11 RUR-5		
CD-LU-10.3	Consult affected residents, cities, special purpose districts, tribes, and other parties prior to final approval of any annexation.	Policy CD-1.3	Consult affected citizens, cities, special purpose districts, and other parties prior to final approval of any annexation.	MPP-RGS-16	UGA-11		
CD-LU-10.4	Ensure that additional capacity associated with expansion of the BLUGA maintains the current capacity of the Pierce County urban growth area through targeted reductions to the CUGA.	Policy CD-1.4	Ensure that additional capacity associated with expansion of the BLUGA maintains the current capacity of the Pierce County urban growth area through targeted reductions to the CUGA.	MPP-RGS-5 MPP-RGS-14 MPP-RGS-16	TR-11.2 UGA-1.2 - UGA-3.1 UGA-3.3 UGA-3.4 UGA-5.3 UGA-5.3.2 UGA-5.3.3 UGA-5.4 RUR-2		

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Goal/ Policy #	Goal/Policy	Goal/ Policy #	Goal/Policy	MPP	CPP	RCW/WAC	
		Goal CD-10	Provide a variety of housing options that will meet the needs of all Bonney Lake's residents and are affordable to all economic segments of Bonney Lake.				See Envision Bonney Lake "Goal CD-H-1" for reference and modifications.
		Policy CD-10.1	Encourage the development of a diverse and high quality housing stock that provides a range of housing types (including family and larger-sized units) to accommodate the diverse needs of Bonney Lake's residents through changes in age, family size, and various life changes.	Not applicable.	Not applicable.	Not applicable.	Policy was removed.
		Policy CD-10.2	Encourage the development of special-needs housing, especially for seniors, such as independent living facilities, various degrees of assisted living facilities, and skilled nursing care facilities.				See Envision Bonney Lake "CD-H-9.4" for reference and modifications.
		Policy CD-10.3	Actively promote community awareness and education campaigns regarding affordable housing in order to engender acceptance throughout the community.	Not applicable.	Not applicable.	Not applicable.	Policy was removed.
		Policy CD-10.4	Explore methods and partnerships to reduce the costs associated with developing housing.	Not applicable.	Not applicable.	Not applicable.	Policy was removed.
		Policy CD-10.5	Ensure that there is a sufficient supply of housing affordable to all income levels by maintaining a supply of housing that is currently affordable to median-income, low income and very low-income households, and work to increase the supply of housing affordable to households within Bonney Lake that make eighty percent (80%) of the Pierce County Median Income by 702 housing units.	Not applicable.	Not applicable.	Not applicable.	Policy was removed.
		Policy CD-10.6	Actively participate in regional responses to housing needs and issues				Policy was removed.
		Policy CD-10.7	Allow the use of recreational vehicles (RVs) as a primary residence within mobile home parks when all applicable regulations can be satisfied.				See Envision Bonney Lake "CD-H-3.2" for reference and modifications.
		Policy CD-10.8	Allow manufactured homes in all residential zones that allow single-family residences				See Envision Bonney Lake "CD-H-6.4" for reference and modifications.
		Policy CD-10.9	Regulate residential structures occupied by persons with handicaps no differently than similar residential structures occupied by a family or unrelated individuals.	Not applicable.	Not applicable.	Not applicable.	Policy was removed.
Goal CD-PR-1	Protect the property rights of landowners.	Goal CD-11	Protect the property rights of landowners.			RCW 36.70A.020(6)	GMA Goal
CD-PR-1.1	All private property and private property rights of Bonney Lake residents shall be fully protected under the Fifth and Fourteenth Amendments of the United States Constitution and the United States Civil Rights Act.					RCW 36.70A.020(6)	GMA Goal
CD-PR-1.2	Balance the responsibility to protect the community from the impacts associated with new residential and commercial development with the responsibility to protect property rights.	Policy CD-11.1	Balance the responsibility to protect the community from the impacts associated with new residential and commercial development with the responsibility to protect property rights.			RCW 36.70A.020(6)	GMA Goal
CD-PR-1.3	Build into the regulatory framework procedures for avoiding takings, such as variances or exemptions.	Policy CD-11.2	Build into the regulatory framework procedures for avoiding takings, such as variances or exemptions.			RCW 36.70A.020(6)	GMA Goal
CD-PR-1.4	Continue working to streamline the permitting process utilizing LEAN principals in order to efficiently process permit applications.	Policy CD-11.3	Continue to work to streamline the permitting process utilizing LEAN principals in order to efficiently process permit applications.	MPP-DP-47		RCW 36.70A.020(6)	
CD-PR-1.5	Private property shall not be taken for public use without just compensation having been made. The property rights of landowners shall be protected from arbitrary and discriminatory actions.					RCW 36.70A.020(6)	GMA Goal
Goal CD-PR-2	Provide property owners the opportunity to participate in local decision-making when the decisions affect their lives and property.					RCW 36.70A.020(6)	GMA Goal
CD-PR-2.1	The following rights shall be considered in decision-making: (1) The right of a property owner to physically possess and control their interests in property, including easements, leases, or mineral rights. (2) The right of a property owner to use, maintain, develop, and improve his or her property for personal use or for the use of any other person, subject to state law and local ordinances. (3) The right of the property owner to privacy and to exclude others from the property to protect the owner's possessions and property. (4) The right of a property owner to dispose of his or her property through sale or gift.					RCW 36.70A.020(6)	GMA Goal

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CD-PR-2.2	Persons within 300-feet of site specific quasi-judicial and legislative action have the right to notice of public hearing(s) and participate in land use and zoning decisions of the City.					RCW 36.70A.020(6)	GMA Goal
CD-PR-2.3	The City will ensure that its land development regulations provide adequate public notice of proposed changes to the comprehensive plan, and zoning changes to afford affected persons with sufficient time to become informed and participate in the decision-making process.					RCW 36.70A.020(6)	GMA Goal
CD-PR-2.4	The City will consider implementing and maintaining processes to better inform the public of proposed changes to the comprehensive plan and zoning regulations.					RCW 36.70A.020(6)	GMA Goal
Goal CD-EV-1	Expand socio-economic opportunity for the citizens of Bonney Lake.	Goal EV-1	Expand socio-economic opportunity for the citizens of Bonney Lake.	Economy Goal			
CD-EV-1.1	Recruit business enterprises that will provide residents with employment wages at or above county median income levels.	Policy EV-1.1	Recruit business enterprises that will provide residents with employment wages at or above county median income levels.	MPP-EC-1 MPP-EC-9 MPP-EC-13	EC-1.5 EC-2.1 EC-2.6 EC-2.7 EC-2.10 EC-2.11 EC-2.12 EC-4 EC-4.9		
CD-EV-1.2	Encourage institutions of higher education to create online or satellite educational and training programs that are readily available to Bonney Lake citizens, or within reasonable commuting distance.	Policy EV-1.2	Encourage institutions of higher education to create online or satellite educational and training programs that are readily available to Bonney Lake citizens, or within reasonable commuting distance.	MPP-EC-10 MPP-EC-13	EC-1.5 EC-2.1 EC-2.6 EC-2.7 EC-2.10 EC-2.11 EC-2.12 EC-4 EC-4.9		
CD-EV-1.3	Work with other public agencies and private interests, including the Tacoma-Pierce County Economic Development Board (EDB), Sumner and White River School Districts, Chamber of Commerce, and others to promote employment and occupational training and advancement programs and job placement skills.	Policy EV-1.3	Work with other public agencies and private interests, including the Tacoma-Pierce County Economic Development Board (EDB), Sumner and White River School Districts, Chamber of Commerce, and others to promote employment and occupational training and advancement programs and job placement skills.	MPP-EC-11 MPP-EC-13	EC-1.5 EC-2.1 EC-2.6 EC-2.7 EC-2.10 EC-2.11 EC-2.12 EC-4 EC-4.9 TR-4		
CD-EV-1.4	Work with other public agencies and private interests to promote daycare services and facilities for pre-school children, before and after school latchkey children, and special populations including elderly and handicapped adults to support working household members.	Policy EV-1.4	Work with other public agencies and private interests to promote daycare services and facilities for pre-school children, before and after school latchkey children, and special populations including elderly and handicapped adults to support working household members.	MPP-RC-2 MPP-EC-13 MPP-EC-14	AH-7 EC-2.7 ENV-12.2 TR-6.4.2 AH-3 AH-4 TR-4 TR-4.3 TR-4.4 TR-4.1.1		
CD-EV-1.5	Work with other public agencies and private interests to create interactive and linked websites listing employment opportunities.	Policy EV-1.5	Work with other public agencies and private interests to create interactive and linked websites listing employment opportunities.	MPP-EC-2 MPP-EC-13	EC-1.5 EC-2.1 EC-2.6 EC-2.7 EC-2.10 EC-2.11 EC-2.12 EC-4 EC-4.9 TR-4		

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Goal/ Policy #	Goal/Policy	Goal/ Policy #	Goal/Policy	MPP	CPP	RCW/WAC	
CD-EV-1.6	Identify and encourage programs that will reduce the cap between wages paid and the Self Sufficiency Standard.	Policy EV-1.6	Identify and encourage programs that will reduce the cap between wages paid and the Self Sufficiency Standard.	MPP-EC-1 MPP-EC-9 MPP-EC-13	EC-1.5 EC-2.1 EC-2.6 EC-2.7 EC-2.10 EC-2.11 EC-2.12 EC-4 EC-4.9		
CD-EV-1.7	Enhance access to quality childcare through programs that are compatible with households' economic resources and supported by public and private resources.			MPP-EC-10			
Goal CD-EV-2	Enhance and maintain Bonney Lake's residential quality of life as an economic development strategy, capitalizing on Bonney Lake's affordability, recreational amenities, and scenic resources to attract people to live and work within the City.	Goal EV-2	Enhance and maintain Bonney Lake's residential quality of life as an economic development strategy, capitalizing on Bonney Lake's affordability, recreational amenities, and scenic resources in order to attract people to live and work within the City.	Economy Goal	EC-1		
CD-EV-2.1	Promote the proximity of Lake Tapps, Crystal Mountain, and Mount Rainier as part of business recruitment and marketing efforts.	Policy EV-2.1	Promote the proximity of Lake Tapps, Crystal Mountain, and Mount Rainier as part of business recruitment and marketing efforts.	Development Patterns Goal			
CD-EV-2.2	Maintain and increase City investment in public amenities that contribute to high quality of life for Bonney Lake residents, including parks, public spaces, civic gathering places, sidewalks and streetscapes.	Policy EV-2.2	Maintain and increase City investment in public amenities that contribute to high quality of life for Bonney Lake residents, including parks, public spaces, civic gathering places, sidewalks and streetscapes.	MPP-DP-3 MPP-DP-10 MPP-DP-11 MPP-DP-12	TR-5 TR-6 CU-2		
CD-EV-2.3	Utilize design guidelines to improve the City's physical environment and make the City an attractive destination.	Policy EV-2.3	Utilize design guidelines to improve the City's physical environment and make the City an attractive destination.	MPP-DP-6 MPP-DP-9 MPP-DPP-10	HAC-3 CU-2		
CD-EV-2.4	Develop a system of sidewalks, bicycle lanes and trails to provide pedestrian and bicycle connection between residential neighborhoods, parks, civic gathering spaces and centers.	Policy EV-2.4	Develop a system of sidewalks, bicycle lanes and trails to provide pedestrian and bicycle connection between residential neighborhoods, parks, civic gathering spaces and centers.	MPP-EN-21 MPP-DP-3 MP-DP-11 MPP-T-5 MPP-T-15	ENV-39 TR-5 TR-9		
Goal CD-EV-3	Strengthen Bonney Lake's role as a hub for regional retail, personal and professional services, and employment.	Goal EV-3	Strengthen Bonney Lake's role as a hub for regional retail, personal and professional services, and employment.	Economy Goal	EC-1 EC-1.1		
CD-EV-3.1	Promote Bonney Lake's role as a regional retail center and raise awareness of retail development opportunities to build upon or round out the City's economic strengths.	Policy EV-3.1	Promote Bonney Lake's role as a regional retail center and raise awareness of retail development opportunities to build upon or round out the City's economic strengths.	MPP-EC-17	EC-4.8 HAC-1 HAC-2 HAC-3 HAC-4 H-4		
CD-EV-3.2	Ensure that the City maintains sufficient land capacity to support continued expansion of Bonney Lake's retail base, as well as meet demand for professional and medical offices and other target sectors.	Policy EV-3.2	Ensure that the City maintains sufficient land capacity to support continued expansion of Bonney Lake's retail base, as well as meet demand for professional and medical offices and other target sectors.	MPP-EC-1	EC-2.6		
CD-EV-3.3	Actively promote investment and business recruitment to strengthen Bonney Lake's position in sectors that have significant growth potential, such as professional services and medical office.	Policy EV-3.4	Actively promote investment and business recruitment to strengthen Bonney Lake's position in sectors that have significant growth potential, such as professional services and medical office.	MPP-EC-1 MPP-EC-14	EC-2.6 EC-2.11 EC-2.12 EC-4		Note: There was a numbering error in Bonney Lake 2035 and Policy EV 3.3 did not exist.
CD-EV-3.4	Provide flexibility in land use plans and development regulations to allow the local business community to take advantage of new business trends and opportunities that are consistent with the City's economic development vision.	Policy EV-3.5	Provide flexibility in land use plans and development regulations to allow the local business community to take advantage of new business trends and opportunities that are consistent with the City's economic development vision.	MPP-EC-2 MPP-EC-7	EC-2 EC-2.6 EC-4.9		
Goal CD-EV-4	The City will strive to have higher and technical educational opportunities available to all residents within Bonney Lake.	Goal EV-4	The City will strive to have higher and technical educational opportunities available to all residents within Bonney Lake.	Economy Goal	ED-3		
CD-EV-4.1	Build relationships with community colleges and technical colleges in order to develop a long-term strategy to locate a technical college, community college extension, or training programs within Bonney Lake.	Policy EV-4.1	Build relationships community colleges and technical colleges in order to develop a long-term strategy to locate a technical college, community college extension, or training programs within Bonney Lake.	MPP-EC-10	ED-3		
Goal CD-EV-5	Establish a supportive climate that encourages the retention of existing businesses and encourages business investment in the community.	Goal EV-5	Establish a supportive climate that encourages the retention of existing businesses and encourages business investment in the community.	Economy Goal	EC-2.9		

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CD-EV-5.1	Promote economic development as a City priority, tied directly to the City's ability to serve residents and businesses well. Ensure City staff members have appropriate understanding of the City's economic development interests and their individual roles in contributing.	Policy EV-5.1	Promote economic development as a City priority, tied directly to the City's ability to serve residents and businesses well. Ensure City staff members have appropriate understanding of the City's economic development interests and their individual roles in contributing.	MPP-EC-2 MPP-EC-7	EC-2 EC-2.6 EC-4.9		
CD-EV-5.2	Promote a customer-service orientation in development services that facilitates development aligned with the community's vision and land use regulations.	Policy EV-5.2	Promote a customer-service orientation in development services that facilitates development aligned with the community's vision and land use regulations.	MPP-EC-2 MPP-EC-8	EC-2 EC-2.6 EC-4.10		
CD-EV-5.3	Clearly establish and communicate the community's vision for Bonney Lake as a whole, as well as for major sub-geographies, to provide the local business community with clear direction on the appropriateness of various types of development in different parts of the City.	Policy EV-5.3	Clearly establish and communicate the community's vision for Bonney Lake as a whole, as well as for major sub-geographies, to provide the local business community with clear direction on the appropriateness of various types of development in different parts of the City.	MPP-EC-2 MPP-EC-9	EC-2 EC-2.6 EC-4.11		
CD-EV-5.4	Ensure that taxes, fees, and dedications assessed as part of the development review process do not become an undue obstacle to economic growth.	Policy EV-5.4	Ensure that taxes, fees, and dedications assessed as part of the development review process do not become an undue obstacle to economic growth.	MPP-EC-2 MPP-EC-10	EC-2 EC-2.6 EC-4.12		
CD-EV-5.5	Enforce development regulations in a consistent, objective manner, encouraging and facilitating investment that adheres to these policies.	Policy EV-5.5	Enforce development regulations in a consistent, objective manner, encouraging and facilitating investment that adheres to these policies.	MPP-EC-2 MPP-EC-11	EC-2 EC-2.6 EC-4.13		
CD-EV-5.6	Promote public understanding of the City's positive development climate and desire for business investment, both within the local business community and for the public.	Policy EV-5.6	Promote public understanding of the City's positive development climate and desire for business investment, both within the local business community and for the public.	MPP-RC-2 MPP-EC-2 MPP-EC-11	AH-7 EC-2 EC-2.6 EC-2.7 ENV-12.2 TR-6.4.2 AH-3 AH-4 TR-4 TR-4.3 TR-4.4 TR-4.1.1 EC-4.13		
CD-EV-5.7	Consider the use of organizational and financial tools to leverage private sector resources in accomplishing the city's economic development and land use vision.	Policy EV-5.7	Consider the use of organizational and financial tools to leverage private sector resources in accomplishing the city's economic development and land use vision.	MPP-EC-2 MPP-EC-11	EC-2 EC-2.6 EC-4.13		
CD-EV-5.8	Facilitate economic development in commercial areas through public/private partnerships if the activity is consistent with the city's adopted policies, if there is a compelling public benefit, and if there is an acceptable level of risk.	Policy EV-5.8	Facilitate economic development in commercial areas through public/private partnerships if the activity is consistent with the city's adopted policies, if there is a compelling public benefit, and if there is an acceptable level of risk.	MPP-RC-2 MPP-EC-2 MPP-EC-11	AH-7 EC-2 EC-2.6 EC-2.7 ENV-12.2 TR-6.4.2 AH-3 AH-4 TR-4 TR-4.3 TR-4.4 TR-4.1.1 EC-4.13		
Goal CD-EV-6	Implement subarea plans for the Downtown, Midtown, and Eastown Centers to ensure a balanced mix of jobs and businesses and to enhance Bonney Lake's built environment.	Goal EV-6	Implement subarea plans for the Downtown, Midtown, Eastown, and Lake Tapps centers to ensure a balanced mix of jobs and businesses and to enhance Bonney Lake's built environment.	MPP-RGS-1	C-25		Removed "...and Lake Tapps..."
CD-EV-6.1	Establish a regular review and update cycle for the Centers and Eastown Subarea Plans to keep these plans current with emerging economic trends and changing development conditions in Bonney Lake.	Policy EV-6.1	Establish a regular review and update cycle for the Downtown, Midtown, and Eastown Subarea Plans to keep these plans current with emerging economic trends and changing development conditions in Bonney Lake.	MPP-EC-6 MPP-EC-21	C-26		Consolidated Downtown and Midtown to sat "Centers".
CD-EV-6.2	Ensure the vision statements of the Centers and Eastown Subarea Plans each promote a particular mix of businesses and define land uses that are most appropriate and desirable for each subarea.	Policy EV-6.2	Ensure the vision statements of the Downtown, Midtown, and Eastown Subarea Plans each promote a particular mix of businesses and define land uses that are most appropriate and desirable for each subarea.	MPP-EC-6 MPP-EC-21	C-26		

2024 Proposed Goals and Policies - Envision Bonney Lake		2015 Existing Goals and Policies - Bonney Lake 2035		Requirement			Notes
Goal/ Policy #	Goal/Policy	Goal/ Policy #	Goal/Policy	MPP	CPP	RCW/WAC	
CD-EV-6.3	Ensure the policies and standards of the Centers and Eastown Subarea Plans establish distinct identities for each subarea and for Bonney Lake as a whole.	Policy EV-6.3	Ensure the policies and standards of the Downtown, Midtown, and Eastown Subarea Plans establish distinct identities for each subarea and for Bonney Lake as a whole.	MPP-EC-6 MPP-EC-21	C-26		
Goal CD-EV-7	Provide well-planned, maintained, and high-quality public infrastructure that supports business and community growth.	Goal EV-7	Provide well-planned, maintained, and high quality public infrastructure that supports business and community growth.	Transportation Goal Public Services Goal	AH-3.2 C-19 CU-3 EC-1.9 EC-3.8 TR-9		
CD-EV-7.1	Coordinate with the Washington Department of Transportation (WSDOT) and Pierce County to plan for access improvements and infrastructure maintenance in the SR 410 corridor and surrounding area.	Policy EV-7.1	Coordinate with the Washington Department of Transportation (WSDOT) to plan for access improvements and infrastructure maintenance in the SR 410 corridor.	MPP-EC-6	TR-1.3 TR-8 TR-8.3 TR-14 TR-17.6 TR-18.4		
CD-EV-7.2	Partner with local businesses to identify infrastructure conditions that pose obstacles to economic growth.	Policy EV-7.2	Partner with local businesses to identify infrastructure conditions that pose obstacles to economic growth.	MPP-EC-6	EC-1 EC-2		
CD-EV-7.3	Maintain updated plans for water, sewer, stormwater, and transportation infrastructure to ensure that the facilities necessary to serve desired commercial growth are in place.	Policy EV-7.3	Maintain updated plans for water, sewer, stormwater, and transportation infrastructure to ensure that the facilities necessary to serve desired commercial growth are in place.	MPP-EC-6	EC-21.6		
Goal CD-H-1	Provide a variety of housing options that will meet the needs of all Bonney Lake's current and future residents and are affordable to all economic segments of Bonney Lake.	Goal CD-10	Provide a variety of housing options that will meet the needs of all Bonney Lake's residents and are affordable to all economic segments of Bonney Lake.	Housing Goal	CU-1.3 UGA-7.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Added "current and future" before residents. Goal added to comply with HB1220.
CD-H-1.1	Ensure that sufficient acreage and densities are designated on the Future Land Use Map and Zoning Map to enable reaching the City's allocated 20-year housing growth targets.			MPP-H-1 MPP-RC-14 MPP-RGS-1 MPP-RGS-2	AH-2 GT-3	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-1.2	Update the City's development regulations to permit a range of housing types that is consistent with the City's growth strategy. This may include attached and detached single-unit dwellings, cottages, townhomes, accessory dwelling units, apartments, mixed-use, permanent supportive housing, income-restricted housing, and emergency shelters.			MPP-DP-1 MPP-H-1 MPP-H-2	AH-2 CU-1.3 UGA-7.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
Goal CD-H-2	Encourage preservation and rehabilitation of the existing housing stock.			MPP-H-3 MPP-H-4	AH-1 AH-2	RCW 36.70A.070(2) WAC 365-196-410(2)	Goal added to comply with HB1220.
CD-H-2.1	Encourage the maintenance, repair, and rehabilitation of the City's existing housing stock by encouraging homeowners to take advantage of existing maintenance, repair, weatherization, and preservation programs, services, and resources.			MPP-H-3 MPP-H-4	AH-2.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-2.2	Promote private and public efforts to preserve the existing quality housing stock by maintaining sound units, rehabilitating substandard units, and replacing severely deteriorated units.			MPP-H-3 MPP-H-4	AH-1 AH-2 AH-2.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-2.3	Encourage health-related improvements to older homes, including the removal of lead-based paint, asbestos, and other potentially harmful materials.			MPP-H-3 MPP-H-4	AH-1 AH-2 AH-2.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-2.4	Encourage the rehabilitation and reuse, rather than demolition, of existing housing.			MPP-H-3 MPP-H-4	AH-1 AH-2 AH-2.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
Goal CD-H-3	Recognize that existing mobile and manufactured home parks provide an affordable housing option for Bonney Lake residents.			MPP-H-3 MPP-H-4	AH-1 AH-2 AH-2.1	RCW 36.70A.070(2) WAC 365-196-410(2)	
CD-H-3.1	Preserve and maintain existing mobile and manufactured home parks that are in proximity to essential services and multi-modal transportation options.			MPP-H-3 MPP-H-4	AH-1 AH-2 AH-2.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-3.2	Allow the use of recreational vehicles (RVs) as a primary residence within mobile and manufactured home parks when all applicable regulations can be satisfied.	Policy CD-10.7	Allow the use of recreational vehicles (RVs) as a primary residence within mobile home parks when all applicable regulations can be satisfied.	MPP-H-2 MPP-H-6	AH-1 AH-2 AH-2.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Added "... and manufactured home parks" for clarity.
Goal CD-H-4	Take reasonable steps to prevent displacement of existing residents.			MPP-H-12	AH-1 AH-3 AH-8 AH-8.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Goal added to comply with HB1220.

2024 Proposed Goals and Policies - Envision Bonney Lake		2015 Existing Goals and Policies - Bonney Lake 2035		Requirement			Notes
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CD-H-4.1	Support ways for older adults and people with disabilities to remain in the community as their housing needs change by encouraging universal design or retrofitting homes for lifetime use.			MPP-H-3 MPP-H-11 MPP-H-12	AH-1 AH-2 AH-2.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-4.2	Adopt regulations to require relocation assistance to households that are displaced by new development or capital improvements.			MPP-H-10	AH-1 AH-3 AH-4 AH-4.1 AH-4.2	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-4.3	Adopt regulations to require owners of apartments or mobile and manufactured home parks to notify tenants and the City in advance of a sale.			MPP-H-12	AH-1 AH-3 AH-4 AH-4.1 AH-4.2	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-4.4	Adopt regulations that provide residents and other eligible organizations an opportunity to purchase or lease a mobile and manufactured home parks prior to any sale, lease, or transfer.			MPP-H-10	AH-1 AH-3 AH-4 AH-4.1 AH-4.2	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-4.5	Provide information on Pierce County's tax assistance program to connect seniors and other special needs populations with available County resources.			MPP-H-11	AH-4.3	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-4.6	Explore the use of existing affordable housing revenue from the State to support a local rental assistance program.				AH-4 AH-4.1 AH-4.2 AH-4.3	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
Goal CD-H-5	Establish minimum property maintenance standards to ensure the general health, safety, and welfare of residents.			MPP-DP-19	AH-2	RCW 36.70A.070(2) WAC 365-196-410(2)	
CD-H-5.1	Support healthy and safe housing by developing and implementing programs to address unfit dwellings, nuisances, and environmental hazards (e.g. excessive noise, poor air quality, light pollution, illegal dumping, illegal signage, graffiti, littering, etc.).			MPP-DP-19	AH-2	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
Goal CD-H-6	Encourage the development of a wide variety of high-quality housing types to accommodate the diverse needs of Bonney Lake's community members through changes in age, household size, income, mobility, and housing preferences.			MPP-DP-1 MPP-H-1 MPP-H-2 MPP-H-3 MPP-H-4	CU-1.3 UGA-7.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Goal added to comply with HB1220.
CD-H-6.1	Allow a variety of residential densities and housing types to enable the development of housing to meet the needs of people of all incomes throughout their lifetime.			MPP-DP-1 MPP-H-1 MPP-H-2 MPP-H-3	CU-1.3 UGA-7.1 AH-1 AH-2	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-6.2	Allow additional housing types, such as cottages, attached single unit dwellings, townhouses, and accessory dwelling units (ADUs), in low-density residential zones.			MPP-DP-1 MPP-H-2	AH-2.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220 and HB 1337.
CD-H-6.3	Promote the development of ADUs within new and existing low-density developments and explore opportunities to promote ADU construction in existing homes. For example, development regulations could provide incentives for new housing developments that include a percentage of ADUs as part of the new construction.			MPP-DP-1 MPP-H-2	AH-2.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220 and HB 1337.
CD-H-6.4	Allow manufactured homes in all residential zones that allow attached or detached single-unit housing.	Policy CD-10.8	Allow manufactured homes in all residential zones that allow single-family residences	MPP-DP-1 MPP-H-2	AH-2.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-6.5	Encourage the fair distribution of housing throughout the City, recognizing that some clustering may be appropriate if in proximity to services and multi-modal housing options.			MPP-H-7 MPP-H-8 MPP-H-9		RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.

2024 Proposed Goals and Policies - Envision Bonney Lake		2015 Existing Goals and Policies - Bonney Lake 2035		Requirement			Notes
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CD-H-6.6	Incentivize the development of housing affordable to households earning 30%, 50%, and 80% of median income and promote mixed-use developments through financial tools, such as the adoption and implementation of a Multi-Family Tax Exemption (MFTE) program.			MPP-H-3 MPP-H-9	AH-1 AH-2 AH-2.1 AH-4 AH-4.2 AH-4.3 AH-4.4 AH-4.5 AH-4.6	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
Goal CD-H-7	Support a range of housing choices for workers at all income levels throughout the City in a manner that promotes accessibility to jobs and provides opportunities to live in proximity to work.			MPP-H-6	AH-4.4 C-36	RCW 36.70A.070(2) WAC 365-196-410(2)	Goal added to comply with HB1220.
CD-H-7.1	Allow housing in the Centers for a variety of incomes, age groups, and household types			MPP-H-6 MPP-H-7	CU-1.3 UGA-7.1 AH-1 AH-2 AH-2.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-7.2	Focus efforts to increase housing in Centers and other areas where jobs, supporting services, and multi-modal transportation choices can be provided.			MPP-H-6 MPP-H-7	AH-3.1 AH-3.2	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-7.3	Encourage adapting non-residential buildings for housing, consistent with State law.				AH-1 AH-2 AH-2.1	RCW 36.70A.070(2) WAC 365-196-410(2)	
Goal CD-H-8	Support access to homeownership for first-time home buyers.			MPP-H-5	AH-7	RCW 36.70A.070(2) WAC 365-196-410(2)	Goal added to comply with HB1220.
CD-H-8.1	Provide information to residents, including underserved populations, on first-time homeownership programs.			MPP-H-5	AH-7	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-8.2	Encourage existing housing providers and private lenders to provide home buyer education seminars for potential first-time homebuyers; include outreach to current renters.			MPP-H-5	AH-7	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
Goal CD-H-9	Enable the provision of special needs and emergency housing.			MPP-H-11	AH-3 AH-3.1 AH-3.2 AH-3.3	RCW 36.70A.070(2) WAC 365-196-410(2)	Goal added to comply with HB1220.
CD-H-9.1	Support actions by agencies, private developers and non-profit organizations to secure grants and loans tied to the provision of special needs housing.			MPP-H-11	AH-3 AH-3.1 AH-3.2 AH-3.3	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-9.2	Support programs that allow people with special needs to independently remain in their own homes for as long as they desire (e.g., home maintenance and repair; home health care; meal programs).			MPP-H-11 MPP-H-12	AH-3 AH-3.1 AH-3.2 AH-3.3	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-9.3	Allow inter-generational housing for individuals or families who desire to care for members of their household with special needs.			MPP-H-11 MPP-H-12	AH-3 AH-3.1 AH-3.2 AH-3.3	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-9.4	Encourage a range of housing types for special needs households at a variety of incomes, such as independent living, various degrees of assisted living and skilled nursing care facilities.	Policy CD-10.2	Encourage the development of special-needs housing, especially for seniors, such as independent living facilities, various degrees of assisted living facilities, and skilled nursing care facilities.	MPP-H-3 MPP-H-4 MPP-H-11	AH-3 AH-3.1 AH-3.2 AH-3.3	RCW 36.70A.070(2) WAC 365-196-410(2)	Language updated to comply with HB1220.
CD-H-9.5	Permit group homes as required by state and federal law, including where residents receive supportive services such as counseling, foster care, or medical supervision, within any type of dwelling unit.			MPP-H-3	EPF-1.1 AH-3.3 AH-4	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-9.6	Develop regulations for use of alternative housing forms, such as tiny houses, to help meet allocated emergency housing needs in selected areas of the City.			MPP-H-3	AH-2.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-9.7	Permit the development of emergency, transitional and permanent housing with appropriate on-site services for persons with special needs, including but not limited to seniors, persons with disabilities, veterans, at-risk youth, and victims of domestic violence.			MPP-H-3	EPF-1.1 AH-3.3 AH-4	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.

2024 Proposed Goals and Policies - Envision Bonney Lake		2015 Existing Goals and Policies - Bonney Lake 2035		Requirement			Notes
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Goal CD-H-10	Take reasonable action to reduce barriers to meeting housing growth targets in development regulations and permit procedures.			MPP-DP-1 MPP-H-1 MPP-H-2	AH-5 AH-5.1 AH-5.2	RCW 36.70A.070(2) WAC 365-196-410(2)	Goal added to comply with HB1220.
CD-H-10.1	Craft regulations and procedures to provide a high degree of certainty and predictability and minimize unnecessary time delays in the review of permit applications, while still maintaining the integrity of the permitting process and adequate opportunities for public involvement and review.				AH-5 AH-5.1 AH-5.2	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB 1519.
CD-H-10.2	Update development regulations as needed to keep the unit cost of new housing down while providing for a quality living environment for residents.				AH-5 AH-5.1 AH-5.2	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-10.3	Analyze how amendments to development regulations and procedures may impact the cost to permit, construct, repair, and rehabilitate housing.				AH-5 AH-5.1 AH-5.2	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-10.4	Make reasonable accommodations in rules, policies, practices, and services when such accommodations may be necessary to afford persons with disabilities equal opportunity to complete the permit process and use a dwelling.			MPP-H-3 MPP-H-4	AH-3.1 AH-3.2	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-10.5	Support the development of ADUs through streamlined permitting, education and resources, and regular monitoring of the ADU regulations, as required by State law.			MPP-H-1 MPP-H-2 MPP-H-3 MPP-H-4	AH-2.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB 1220 and HB 1337.
Goal CD-H-11	Ensure high-quality housing through clear, objective design and construction standards.			MPP-DP-19	AH-5	RCW 36.70A.070(2) WAC 365-196-410(2)	Goal added to comply with HB1220.
CD-H-11.1	Ensure that adequate buffer and building design standards minimize the impacts of more intensive development on adjacent residential uses, by incorporating design guidelines in the development code and enforcing building code requirements. Design guidelines should be clear and objective and should address visual consistency, height transitions, and buffers.			MPP-DP-19\ MPP-EN-5	TR-5 TR-21.2.2	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-11.2	Provide effective transitions between different uses and intensities, including between new housing and existing housing, through development regulations that address design and scale.			MPP-DP-1 MPP-H-1 MPP-H-2 MPP-H-3 MPP-H-4	AH-1 AH-2 AH-2.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-11.3	Allow "clustering" of housing to preserve and protect environmentally sensitive areas.			MPP-EN-10 MPP-EN-14 MPP-DP-40	AH-2.1 ENV-13.5 ENV-16.1	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
Goal CD-H-12	Ensure that adequate services and infrastructure are planned to support the allocated housing target.			MPP-DP-37 MPP-PS-6 MPP-PS-19 PS-ACTION-2	RUR-12	RCW 36.70A.070(2) WAC 365-196-410(2)	Goal added to comply with HB1220.
CD-H-12.1	Provide physical infrastructure, park, recreational and cultural amenities, and coordinate the provision of educational facilities throughout the City to support the creation of attractive neighborhoods for residents of all ages, incomes, and household types.			MPP-DP-37 MPP-PS-6 MPP-PS-19 PS-ACTION-2	RUR-12	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-12.2	Communicate early with residents served by on-site septic systems or wells when planned utility extensions or rezoning may impact them.			MPP-DP-37 MPP-PS-6 MPP-PS-19 PS-ACTION-2	RUR-12	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
Goal CD-H-13	Strive to reduce disparate housing impacts, exclusion, and displacement risk in Bonney Lake, by acting within the City's power to update plans, policies, and development regulations.			MPP-H-12	AH-1 AH-8	RCW 36.70A.070(2) WAC 365-196-410(2)	Goal added to comply with HB1220.
CD-H-13.1	Monitor and report trends related to disparate housing impacts, exclusion, and displacement risk at times when implementation reports and periodic updates are done for the Comprehensive Plan.			MPP-H-12	AH-8	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-13.2	If trends monitored under Policy CD-H-13.1 are worsening, review City plans, policies and development regulations and update as needed to improve outcomes. Ask for input from the people experiencing the impacts to inform City actions.			MPP-H-12	AH-8	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-13.3	Prevent discrimination and encourage fair and equitable access to housing for all persons in accordance with state and federal law.			Housing Goal	AH-8	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.

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Goal CD-H-14	Ensure coordination with regional agencies to address regional and City housing needs.			MPP-H-11 MPP-RC-7	AH-4 AH-4.2 AH-4.3 AH-4.4 AH-4.5 AH-4.6	RCW 36.70A.070(2) WAC 365-196-410(2)	Goal added to comply with HB1220.
CD-H-14.1	Identify local housing needs and priorities, and coordinate with community partners to address those needs, including housing rehabilitation.			MPP-H-11 MPP-RGS-2	AH-1 AH-2	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-14.2	Actively work with Pierce County and other local governments to investigate and implement regional funding options to support the development and/or maintenance of affordable housing such as a regional housing trust fund, regional housing tax levy, real estate excise tax or other mechanisms.			MPP-RC-12 MPP-H-11	AH-4 TR-19	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-14.3	Support the work of for-profit and non-profit housing developers to facilitate construction or acquisition of housing units for households earning 30%, 50%, and 80% of median income.			MPP-H-11	AH-1 AH-2 AH-2.1 AH-4 AH-4.2 AH-4.3 AH-4.4 AH-4.5 AH-4.6	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-14.4	Work with Pierce County and health and social service organizations to develop a coordinated, regional approach to homelessness.			MPP-H-11	AH-4 AH-4.2 AH-4.3 AH-4.4 AH-4.5 AH-4.6	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.
CD-H-14.5	Support housing legislation at the local, regional, state, and federal levels to promote the goals and policies of this Comprehensive Plan.			Housing Goal MPP-RC-7	AH-6 AH-6.1 AH-6.2	RCW 36.70A.070(2) WAC 365-196-410(2)	Policy added to comply with HB1220.



Puget Sound Regional Council

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August 5, 2024

Lauren Balisky, Interim Planning Manager
City of Bonney Lake
9002 Main St E
Bonney Lake, WA 98391

Subject: PSRC Comments on City of Bonney Lake Comprehensive Plan Housing Element

Dear Ms. Balisky,

Thank you for providing an opportunity for the Puget Sound Regional Council (PSRC) to review the housing element of Bonney Lake's draft comprehensive plan. We appreciate that the city has invested a substantial amount of time and effort in developing the element and look forward to reviewing the rest of the draft plan. This timely collaboration provides an opportunity to review the draft plan and prepares the city well for [certification](#) by PSRC once the full plan has been adopted.

We suggest the city consider the following comments as further work is completed for the comprehensive plan update to align with [VISION 2050](#) and the Growth Management Act. We reviewed the housing element using the housing section of the PSRC [Plan Review Consistency Tool](#). We will look at other sections of the tool once we receive additional sections of the draft plan. Key sections of the consistency tool are listed below on the left along with relevant comments on the draft plan on the right.

Housing

Plan Review Consistency Tool	PSRC Comment on Draft Plan
Increase housing supply and densities to meet the region's current and projected needs at all income levels consistent with the Regional Growth Strategy (MPP-H-1)	The capacity analysis in the housing element is based on the "Bend the Trend" alternative in 2044 Growth Alternatives Memo. The element should be updated to include supportive information from the memo or a link to the memo and explanation on which alternative was selected.
Identify potential physical, economic, and cultural displacement of low-income households and marginalized populations and work with communities to develop anti-displacement strategies in when planning for growth (MPP-H-12, H-Action-6)	The plan has many excellent housing policies, including several to prevent and mitigate displacement. Many of the policies call for the city to "consider" supportive actions. The policies would be strengthened if "consider" were removed.

PSRC has resources available to assist the city in further development of the draft plan: <https://www.psrc.org/planning-2050/vision/vision-2050-planning-resources>.

We appreciate all the work the city is doing and the opportunity to review and provide comments. We are happy to continue working with you as the plan progresses through the draft and adoption process. If you have any questions or need additional information, please contact me at eharris@psrc.org.

Sincerely,



Erika Harris, AICP, Growth Management Planning
Puget Sound Regional Council

cc: Review Team, Growth Management Services, Department of Commerce

- 09.28.24 -
TWENTY YEAR
ANNIVERSARY
CELEBRATION



5:00 PM Doors Open
music and social time

6:30 PM Dinner Buffet

\$10 Pre-Registration Required

** Fee is per person, plus processing
fee and includes everything for the
evening (entry, food, beverages)*

- REGISTRATION ENDS -
Sunday, Sept 22 at 5:00 PM
Don't wait until the last minute!

Sumner VFW Hall
1705 Willow St
Sumner, WA 98390

See you there!

